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ABSTRACT

This guide, which is intended primarily for adult education practitioners in Virginia, explains the process of developing workplace basic skills programs. Presented first is background information on the guide's development. The following are among the topics discussed in the guide's seven chapters: the need for work force education (changes in business and education and changing definitions of literacy); marketing and assessment of training needs (adult educators and employer roles in marketing efforts; business conduct; informal and formal assessment techniques); recruitment and selection (selecting measurement and formal assessment instruments); funding and contracting (stakeholders, contractual issues, cost estimation, financial responsibility, funding sources); curriculum design (curriculum needs in changing workplaces, finalizing employer requirements and expectations); staff development resources (recruitment, selection, and preparation of instructors); and delivery of instruction (employer and employee goals, end-of-program evaluations). Appendixes constituting approximately 75% of the guide contain the following: sample introductory comments to workplace students; learning style characteristics; learning style tips; information about learning style preference; workplace teaching tips; sample workplace math problems; two lifelong learning evaluation surveys; sample evaluation results for students in a basic math skills class; tips for effective (lively and exciting) training; and discussion of workplace education versus adult basic education. (MN)

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ED 410 420

Virginia's Guide
to
Workforce Education
Program Development

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Virginia Adult Education Workplace Workgroup
June, 1997

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This *Guide* is published in a three-ring binder format to facilitate use as a hands-on, systematic tool and to accommodate updates. Think of it as a work-in-progress which will be evaluated and re-designed as ideas from the field are submitted which give new insights into successful workplace basic skills programming.

A feedback form is included in the Appendix (Int-2). After reading and/or using the *Guide*, you are encouraged to evaluate it carefully and submit suggestions for improvement by using this form or sending the information in formats of your own choosing.

Copies of this guide are available from:

The Adult Education and Literacy Resource Center
Virginia Commonwealth University
4080 Oliver Hall, 1015 West Main Street
Richmond, VA 23284-2020
Telephone: (804) 828-6521
1-800-237-0178
FAX: (804) 828-7539
sjoyner@saturn.vcu.edu

Dedication

Virginia's Guide to Workforce Education Program Development is dedicated to the countless employees throughout the Commonwealth who attend basic skills programs in the workplace and teach us the joy of adult education.

Table of Contents

Dedication

Table of Contents

Introduction **Pages 1 - 3**
How *Virginia's Guide to Workforce Education Program Development* Came To Be
- The Challenge
- The Response
- The Purpose of the *Guide*
- A Word about the Format
- Feedback
- *List of Resources Located in the Appendix*

Chapter 1: Understanding the Need **Pages 4 - 6**
- A "Wake-up Call"
- The Changing Worlds of Business and Education
- Workplace Education Pays
- The Importance of Workplace Basics
- The Changing Definition of Literacy
- *List of Resources Located in the Appendix*

Chapter 2: Marketing and Assessment of Training Needs **Pages 7 - 25**
- The Marketing Effort
- The Adult Educator Role in the Marketing Effort
- Individual Skills and Characteristics
- Business Conduct
- The Employer Role in the Marketing Effort
- Planning and Implementing a Marketing Strategy
- Identifying Prospective Employers
- Initiating Contact
- Defining the "Client"
- Basic Skills Advisory Team
- Assessment
- Developing an Assessment Plan
- Gathering Information for Assessment Purposes
- Informal Assessment Techniques
- Formal Assessment Instruments
- Assessment Results
- Evaluation
- *List of Resources Located in the Appendix*

Chapter 3: Recruitment and Selection Pages 26 - 34
- Recruiting Employees
- Assessing Individuals
- Selecting a Measurement Instrument
- Formal Assessment Instruments
- *List of Resources Located in the Appendix*

Chapter 4: Funding and Contracting Pages 35 - 39
- Basic Steps Involved in Funding and Contracting
- Stakeholders
- Establishing Communication around Contractual Issues
- Estimating Costs
- Assigning Financial Responsibility
- Identifying Funding Sources
- Implementation
- Evaluation
- *List of Resources Located in the Appendix*

Chapter 5: Curriculum Design Pages 40 - 52
- Curriculum Needs in a Changing Workplace
- Basic Skills Programs: The Adult Education/Workplace Curriculum Continuum
- Linking Workplace Programs with Job Performance
- Using Available Information and Simple Methods to Reveal Linkages
- Verifying Initial Program Objectives with Results from Job Analysis Process
- Company-Directed Logistics
- Who Influences Curriculum Design?
- What Do You Want The Program To Accomplish?
- Finalizing Employer Requirements and Expectations
- Evaluation
- *List of Resources Located in the Appendix*

Chapter 6: Staff Development Resources Pages 53 - 58
- Roles and Responsibilities around Staff Development
- Recruitment and Selection of Instructors
- Preparation of Instructors
- Evaluation
- *List of Resources Located in the Appendix*

Chapter 7: Delivery of Instruction Pages 59 - 63
- Workplace Training -- A New Experience for Adult Educators
- Goals and Objectives of the Workplace Program
- Clarifying Employer Goals and Objectives
- Establishing Individual Goals and Class Guidelines
- End-of-Program Evaluation
- *List of Resources Located in the Appendix*

Appendices

How *Virginia's Guide* *to* *Workforce Education Program Development* Came To Be

The Challenge

In 1994, the Virginia Office of Adult Education formed a team of thirteen adult education workplace practitioners with the task of developing of a "how to" manual for providing Adult Education skills programs in the workplace.

The Response

This *Guide* is the product of the Virginia Adult Education Workplace Workgroup, as the 13-member writing team came to be known; thus, it springs from the knowledge and experience of adult educators in Virginia who have in one way or another participated in workplace basic skills programs throughout the Commonwealth. These professionals have several decades of experience marketing, developing, administering, and teaching workplace basic skills programs. Names of those who served on the writing team are cited below. Their addresses and telephone numbers can be found in the Appendix at the back of the *Guide*.

Rex Adams
Judy Bailey Kinker
Brenda Bryant
Carolyn Crowder
Glenda Harrell
Charles Goodman
Bill Greene
Beverly Lancaster
Betsy Mathias
Fran Mitchell
Paul Parker
Dale Temple
Steve Veno
Stacey Wright
Dot Hayes

The Purpose of the *Guide*

The *Guide* is designed for use by a wide variety of groups and individuals who have at least one thing in common -- an interest in workplace basic skills programs. Primarily, it is an attempt to capture best practices for public and private literacy providers who are called upon to develop, market, and deliver workplace programs, often with little or no background or expertise in workplace training.

Although the *Guide* is geared toward adult education practitioners, the principles are equally applicable to marketing any education and/or training program to business and industry. For those who are new to workforce education, the *Guide* offers a glimpse of the cultural differences between business and education. Employers also may find the *Guide* of value as they bring the world of education into their workplaces.

Whether you are a novice, an experienced workplace program marketer, developer, instructor, administrator, or an employer, we sincerely hope you find the *Guide* informative, and even a little entertaining.

As indicated earlier, assessment occurs at many times during the development process and for a variety of reasons:

- Early in the process, the provider may suggest an assessment of the workplace culture and company goals in relation to the basic skills of the workforce
- The employer may wish to assess the workforce to determine if skill levels meet the needs for production of product or service and thus help determine whether or not a basic skills program is indicated.
- Some employers may have a clear understanding of need, but want to use assessment instruments to identify specific employee needs which will determine the content and structure of the program to be developed.

Selecting a Measurement Instrument

Measurement tools used to assess skill levels of individuals who may participate in workplace classes can include both standardized and authentic instruments. The provider should gather a variety of assessment instruments and have an understanding of when and how each may be appropriately used and how the results may be used bye the instructor to facilitate the employee/student's educational program.

Deciding upon the appropriate assessment depends on a number of factors: goals of the class; reporting requirements for the employer; length of the program. The decision of which , if any, assessment instrument to use is best decided upon in conjunction with the program administrator and curriculum designer.

A Word about the Format

The *Guide* is divided into seven chapters, each one covering a major step necessary for development and delivery of successful workplace basic skills programs:

1 Understanding the Need
2 Marketing and Assessment of Training Needs
3 Recruitment and Selection
4 Funding and Contracting
5 Curriculum Design
6 Staff Development Resources
7 Delivery of Instruction

At the end of each chapter is a list of additional resources that are located in the Appendix at the back of the *Guide*. Although the Appendix items are not always cited elsewhere in the text, they provide a wealth of information related to topics covered in the *Guide*. Over eighty entries are included! Please take advantage of this valuable resource!

List of Resources Located in the Appendix

Int-1	The Workplace Workgroup (as of January, 1996)
Int-2	Evaluation Form for Guide
Int-3	Resources
Int-4	Regional Planners and Specialist
Int-5	VA Department of Education, Adult Education and Training

A "Wake-up Call"

Workplace literacy emerged as an issue in the 1980s with the publication of studies that highlighted the changing character of the global economy, and the increased skill requirements for front-line workers.

In 1990, the National Center on Education and the Economy published *America's Choice: High Skills or Low Wages!* This report, which focuses on the organization of work in America and the importance of training front-line workers, had an effect similar to the 1983 National Commission of Excellence in Education report, "A Nation at Risk: The Imperative for Educational Reform." Both works called for dramatic changes in America's education process to enable this country to compete in a global economy.

The Changing Worlds of Business and Education

As business and industry comes to the realization that a literate workforce is a key to a healthy "bottom line," adult education and literacy practitioners must respond with the development of new techniques to meet basic skills needs in the workplace. The method of instruction used in traditional classrooms, and in ABE/GED classrooms, may not be relevant or appropriate in a workplace classroom.

Adult educators become familiar with the process of assessing the basic skills needs of employers, employees, and practitioners. The field learns a new language (business) and becomes familiar with a new culture (making profits). We have one foot in the adult education world and the other in the world of business and industry -- in essence, being bi-lingual and bi-cultural.

While an understanding of the language and culture of business is imperative for adult educators, so too, is an understanding on the part of employers that solid basic skills are a necessary foundation for employees to benefit from higher level training. How can one use Statistical Process Control (SPC), for example, without knowing how to add, subtract, multiply, or divide? How can one teach the math skills needed for SPC without knowing what the subject matter is and how it is used in industry?

Adult education and literacy programs are as diverse in content and quality as they are in number. Some basic trends in Virginia, however, are worth noting:

- Workplace programs in Virginia are geared to the needs of the adult learner;
- Programs are open to adults with a variety of skill levels.

Virginia boasts more than 252 workplace basic skills programs. The *Guide* attempts to capture an analysis of information from practitioners who have participated in many of these programs. The information provided herein comes from experience, not statistical studies, and from successes as well as failures.

Workplace Education Pays

> "The firms that invest in education programs are gaining far more benefits from new technology and the reorganization of work than firms that have introduced quality programs but do not provide basic skills education. Where the two operate in tandem, it has resulted in improvements in productivity, customer satisfaction, delivery time, scrap and error rates, and worker morale."
>
> from *The Missing Link*, Southport Institute for Policy Analysis

The Importance of Workplace Basics

An excellent summary of the importance of basic skills to the future of America is included in the Appendix. This summary is taken from the introduction to *Workplace Literacy: Reshaping the American Workforce* (U.S. Department of Education, Office of Vocational and Adult Education, Division of Adult Education and Literacy, May 1992).

The Changing Definition of Literacy

Today there is no *one* widely accepted definition that totally encompasses the term "literacy," let alone the term "basic skills." For purposes of this *Guide*, however, basic skills refers to those skills needed by employees to function effectively in the workplace, namely:

- Reading
- Math
- Oral Communication
- Problem Solving
- Critical Thinking
- Written Communication
- Information Technology
- Listening Skills

Understanding the Need

CHAPTER PREVIEW: The discovery of the relationship between the financial "bottom line" of business and adult education's ability to provide basic skills programs resulted in the development of this *Guide.* Adult education practitioners and employers must combine efforts to develop a more literate workforce. Meanwhile, the definition of "literacy" continues to change as workplace requirements increase.

List of Resources Located in the Appendix

1-1 *The Missing Link*, Southport Institute for Policy Analysis. (Selected excerpts published in the Business Council on Effective Literacy Newsletter, July, 1992.)

1-2 Introduction to *Workplace Literacy: Reshaping the American Workforce*. (US Department of Education, Office of Vocation and Adult Education, Division of Adult Education and Literacy, May, 1992.)

1-3 *National Adult Literacy Survey (NALS)*: Report Summary

1-4 "Educational Characteristics of Persons over 25 in the New River Valley: 1990 Census" (sample handout)

1-5 Characteristics of Today's and Tomorrow's Workplace, from *What Work Requires of Schools: A SCANS Report for America 2000*. Original Source: "Competing in the New International Economy," Washington Office of Technology Assessment, 1990.

1-6 Bibliographical information on *Workplace Basics: The Skills Employers Want*

1-7 Bibliographical information on *What Work Requires of Schools: A SCANS Report for America 2000*

1-8 Bibliographical information on *The State of the South: A Report to the Region and Its Leadership*. MDC, Inc., April, 1996.

The Marketing Effort

Basic skills programs are like any other commodity or service a business or industry buys. Employers ask for and insist upon a quality product in return for their financial investment. Remember, business and education have very different philosophies. Business and industry exist to make a profit, so market programs as the investment in human resources -- which they are.

Solid basic skills, whether offered through a traditional adult education program in the workplace or through a customized curriculum, benefit both the participant and the "bottom line." While this may be difficult to document through test scores, employers do see substantial changes in the attitudes and behaviors of basic skills program participants. It becomes important, therefore, to collect anecdotal information to share with future prospects.

Every part of the process, from marketing to delivery, takes time. It is very rare to meet with a company and have a program on-line immediately. While some programs may go on-line a month after initial contact, in some instances it may take 18 months or longer from initial point of contact to actual instructional delivery.

Many persons may be involved in marketing basic skills programs in the workplace. At the minimum, two people participate, one representing adult education and one representing the employer. The critical roles of each of these "players" will be discussed.

The Adult Educator Role in the Marketing Effort

While no particular position is required in an adult education or literacy program to market workplace basic skills, there are specific skills and characteristics which make those who market successful. Marketing is essential to all implementation. It is not, however, for everybody. Find and develop those in your organization and community who are comfortable and effective as marketers.

Individual Skills and Characteristics

A brief shopping list of skills and characteristics includes (but is not limited to):

- Honesty
- Ability to build trust: Work to develop both personal and professional credibility.
- Ability to maximize opportunities.

Marketing and Assessment of Training Needs

CHAPTER PREVIEW: The objective of marketing is to convince employers that a workforce well grounded in basic skills is a business advantage in today's competitive marketplace. This chapter will take the reader through each step in the process of marketing basic skills programs in the workplace, from identifying clients from among prospective business, industry, and government employers to assessing their workforce education and training needs.

- Good interpersonal skills: Approach the employer as a listener and problem solver. Ask questions, listen to answers, and develop solutions together which address specific problems confronting that business or industry. Basic skills programs are not a "one size fits all" proposition. Part of marketing is meeting a specific need. Don't try to impose your solution unless it fits the employer's stated need.
- Patience
- Excellent communication skills (especially oral communication and listening skills):
  Practice communicating. Videotape yourself or have a reliable person critique your presentation.
- Knowledge of the educational background of the community
- Knowledge of educational resources within the community to meet the needs of business
- Organizational skills: Back up what you promise with action. If you promise to send a proposal within the week, do it!
- Appropriate attire: Always dress professionally, but match your dress to your audience. Dress so the customer is not distracted by what you wear.
- Perseverance
- Contracting Skills

Marketing also requires a working knowledge of the language and culture of business. Being able to "speak" Business as a Foreign Language (BFL) includes conversing intelligently about current educational practices and issues which drive business and industry. There is a growing body of business and industry terminology that the adult education practitioner must assimilate to be an effective marketing force in the workplace. A glossary of business-related terms is located in the Appendix.

Business Conduct

In the age of information-technology and computers, the ability to communicate clearly in all formats is essential to being recognized in the marketplace. Develop a professional "presentation" which promotes and sells the product. Keep the following in mind:

- Always match or exceed the quality of communication you receive from business and industry.
- Create and disseminate a professional information brochure and business cards which list your vital information (name, title, agency, address, phone, fax, E-mail).
- Have attractive, neat, and professional-looking handouts (from census figures to a list of satisfied customers).
- When making presentations, use only high quality written and graphic information.

- Follow-up all business contacts with written correspondence or telephone calls. Always address **correspondence** to a specific person, even when you are sending a mass mailing. You may want to start with the CEO. If the CEO finds the idea interesting s/he will probably pass the information on to the human resource manager or training department. Another approach is to start with the person who would present, initiate, and administer the program, usually the human resource or training department. If a pre-mailing is not getting you 80-100% interviews, drop it. Telephone calls will get you into 80-90% of human resources or training departments. The human resource managers (HRMs) feel good about suppliers, particularly new ones.

  In follow-up **telephone calls**, be direct and ask for an appointment at a specific time. "Mary, this is Bill. I'm following up on our conversation (or letter I wrote you) last week and I'd like to get your input on basic skills programs. Would tomorrow at 2:30 or Thursday at 9:30 a.m. be the best time for us to meet?"
- Keep looking until you find the "right" contact. If you have no success with the CEO, try the HRM or supervisor of training. If the HRM can't be reached, keep in touch with the HRM's secretary. Businesses receive hundreds of calls each month from vendors like you who are selling a product. Be persistent and keep going back. It sometimes takes more than a year from initial contact to program delivery. Timing is important. Keep trying by saying, "May I contact you again in June?"

The Employer Role in the Marketing Effort

Marketing workplace basics pre-supposes employers who are open to developing the basic skills of their workforce. The reasons "why" employers offer basic skills programs are as varied as the workplaces themselves:

- Some employers in business, industry, and government believe that an educated workforce is essential for success in today's competitive marketplace.
- Some companies offer basic skills programs in preparation for down-sizing or lay-offs. They want to provide employees with education and training opportunities so they will be marketable after leaving their employ.
- Some believe that an employee who is learning *anything* (and thus exercising brain cells) is an asset to the company.
- Some seek to stem the high school drop-out rate by encouraging parents to finish high school and set a good example.
- Some want to improve the quality of life of their workforce and community. They seek to "give back to the community" and may open classes to families of employees and members of the community.
- Some employers have assessed the workplace and know exactly what education and training programs they need and want.
- Others have no idea.

- Some think they know what they want, but change their minds during the information gathering and analysis phases.
- Some have no idea that mastering basic skills is essential for success of higher level training efforts. Employees with low math skills, for example, have difficulty mastering statistical process control (or SPC). A "Math for SPC" course could ease the transition to higher level training programs making both employees and training more cost effective.
- Some companies want (or think they can only afford) generic programs.
- Others seek programs that fit their specific company needs, goals, and objectives. These employers expect basic skills training to be flexible, focused on skills needed in the workplace, and designed to help employees better perform job-related tasks.
- Technology entering the workplace.
- Job maintenance—helping employee keep jobs with increasing skill requirements.
- Job advancement—help good employees move up the system.

Adult education practitioners will be interested in knowing the answers to the following questions; therefore, employers should expect to hear these questions or be ready to provide this information in the routine conversation with the adult educator representative:

- What communication channels exist? (e.g. newsletters, paycheck inserts, etc.)
- Is there a union?
- What is the general design of the company? Is there a committee of labor and management? Or is management only to blend employee and management needs?
- Does management think a workplace education program will help?
- Does education/training have a high priority?
- What type of training is regularly conducted?
- How has it been perceived by the workforce?
- Are skill requirements in the workplace changing?
- Is work accomplished in teams or are teams used in decision making?
- Is the organization unionized? What is the relationship between the union, management, and the workforce?
- Are mid-level managers supportive of basic skills classes or are they threatened by them (because perhaps they ought to be in the classes themselves)?
- What does management think the goals of the program should be?
- Will participation in the program be required or voluntary?
- Will employees be paid for participation?
- What facilities are available for course delivery?
- What equipment is available (TV, VCR, overhead projector, computers)?
- How much time will be allocated to the program?

- Will participants' work in the class be confidential?
- When will classes be held? Are multiple sections needed to meet needs of employees on all shifts?
- If employees are to attend class "on the clock", what time best meets the needs of the company? Who will cover jobs while participants are in class?

Planning and Implementing a Marketing Strategy

A well-planned marketing strategy will greatly ease implementation later on. When planning a marketing strategy, begin with the assumption that education is a value-added commodity. Adult education and literacy practitioners are professionals to be highly valued, and, so too, is their product.

Be customer oriented. Approach the employer with a generic product (basic skills), but don't assume you know what they need. There are many different types of basic skills workplace programs. No "one size fits all." One workplace program prepares employees for the GED exam while another teaches the math skills needed to read blueprints. One program teaches hotel housekeepers English as a Second Language while another prepares production workers to read and comprehend Material Safety Data Sheets. Ask questions. Analyze the answers. Ask more questions. Propose a program which meets the employer's particular needs, not your own. Get input from employees.

Often the employer's stated goals do not match those of participants. It is imperative that these issues be addressed early in the process. In addition to covering a host of different topics, workplace programs, like those in traditional adult education classes, include employees of varying skill levels. Participants range from non-readers to high school graduates who are refreshing dormant skills. Emphasize blending employer and employee needs.

Have a clear understanding of the services that can be effectively provided. Don't market a course customized from in-house materials unless you have a curriculum developer on hand and build funding into the contract to pay for development. Do market such a program if you have both the curriculum designer and instructors trained to deliver a customized course. And be sure your providers know what you are marketing so they can deliver as promised. Involve them in the development of the marketing plan. In this way, you can design a marketing plan which is ethical and achievable. Don't promise anything you or your provider cannot deliver.

Between the 1990 U.S. Census and the National Adult Literacy Survey (NALS), ample evidence exists to suggest that a large percentage of the workforce could benefit from basic skills instruction. Marketers should have a variety of materials with quotes and statistics available to hand out when making contacts. Several samples are included in the Appendix.

Regardless of purpose and skill level of those involved, all basic skills workplace programs share a common goal: improving employee skills.

Identifying Prospective Employers

Knowing who prospective employers are and the issues with which they are dealing requires time, energy, and research. Researching local companies and getting to know their business vision and mission are important parts of the identification of good business, industry and government partners. Some ways to discover the key "players" and current business issues are outlined below.

Marketers should:

- Be knowledgeable about the community. Network with a variety of community organizations where business representatives meet. Identify and meet with those who can facilitate the marketing process.
- Create opportunities to speak to local community groups such as Lions, Rotary, or Kiwanis.
- Join the Chamber of Commerce and attend Chamber events.
- Join, attend, and give presentations at professional organizations to which the business community belongs such as:
    - ASTD (American Society for Training and Development)
    - SHRM (Society for Human Resource Managers)
    - IMI (International Management Institute)
    - ASQC (American Society For Quality Control)
- Contact work related organizations such as:
    - Virginia Employment Commission (VEC)
    - Community Advisory Boards
    - Private Industry Council (PIC)
    - Economic Development Agencies
- Host "show and tell" events, which can be powerful. Invite several CEOs or HRMs to hear testimony by managers and students from workplace basic skills classes. Let them "sell" your product. Be sure to offer a meal and require an RSVP. Call your guests the day before the event to remind them. If the person you invited can't attend, suggest a representative be sent instead. Economic Development departments and Chambers of Commerce are often willing to co-sponsor events of this nature. Invite elected representatives and the press. Having a "big name" is a plus.
- Tell everyone you meet about your program and the services you can provide. It's amazing how often the person you sit next to at a meeting is related to the HRM at a local company. Market to your seating companion and let him or her get you an entre with the relative. Casually letting one company know that

another one is sponsoring a basic skills program often has a "keep up with the Joneses effect." Companies don't like to let the competition get ahead and may consider getting started themselves.

- Develop and maintain an extensive database of companies, CEOs, HRMs, addresses, telephone numbers, accurate titles, and specific responsibilities.
- Develop a tracking system or log which includes each contact, a summary of the contact, and other strategic information.
- Newspaper articles of program startups. Radio newspots.

To conserve time and energy, target specific companies for marketing. Look for companies with:

- 50 or more employees. While workplace basic skills programs have been successful in both large and small companies, to be cost effective marketers may wish to concentrate on companies with 50 or more employees.
- less than 50 employees who may be interested in forming an education consortium
  to meet their combined basic skills needs. Consortiums of companies with less than 50 employees are often better served through public classes or literacy volunteer groups. This is also true for rural and urban areas where there is little or no industry.
- progressive management
- good corporate citizenship goals (toward employees and the community).
  Companies fitting this profile are more likely to establish basic skills programs and thus become successful models to follow.

Chambers of Commerce, economic development groups, or planning district offices may be of help in locating companies such as these. The pattern in Virginia suggests that the following are among but not limited to those industries receptive to the development of workforce basic skills programs:

- Furniture manufacturers
- Apparel/textile manufacturers
- Manufacturers of automotive parts
- Departments of local governments
- The hotel industry, particularly for English as a Second Language (ESL) programs
- Service providers such as cooks, maintenance workers, janitorial staffs
- Health care providers
- College and university food service, housekeeping, and physical plant employees
- Temporary employment services
- Ship builders
- Food manufacturing
- Paper and pulp products industry
- Community services agencies

Initiating Contact

The first contact between the marketer and a potential client may be initiated by either party:

- Employer initiated: The business/industry may uncover or recognize the need for workforce basic skills development. In such cases, there is usually a "trigger event"
  which precipitates both awareness and contact. If such an event occurred, it's helpful to know what it is. Ask questions. Listen closely. Bring the trigger to the surface. Triggers may include the purchase of new equipment, changing management and/or management styles, setting new company goals and objectives, a costly error due to poor basic skills, companies seeking certification, the introduction of statistical process control, or employees requesting education opportunities.

- Adult Educator initiated: The company may or may not have recognized the need for basic skills education. In some cases the managers of a company may not be aware of the resources which are available to meet the adult education and training needs of the workforce. Making them aware of available services, and reminding them periodically, will facilitate the selling process when a trigger event happens. Prior to initial contact, research the company. Know what their product or service is and familiarize yourself with as much background information as possible. Also, before contacting an employer, identify key personnel who can facilitate the process or influence decision-making in the corporate structure. Key personnel may include:
    - CEO or President
    - Plant Manager
    - Human Resource Manager (HRM)
    - Personnel Manager
    - Corporate (in-house) trainers or educators
    - Union Representatives

Defining the "Client"

The marketing strategy depends on who is considered to be the client. Adult education and literacy practitioners have traditionally defined the client as the *student*. When establishing workplace basic skills programs defining the client can be difficult. There are many divergent perceptions of what and whose client needs are to be met. A marketer should make no assumptions about who the client is, but should strive to clearly define the client during the information gathering process.

- Marketing on behalf of the ***employee as the client*** requires an approach which appeals to employers as good corporate citizens. The marketing approach might center on the positive ripple effect a basic skills program will have on the employee, the employee's family, and the community as well as the effect the employee wants to have on company profit and productivity.
- Marketing to the ***employer as the client*** focuses on the needs of the company to develop its human resource potential. (It also means convincing prospective participants that the company is investing in its most important resource - people, and not looking for a way to downsize. Before you make any promises to potential participants, make absolutely sure this is NOT the case. Don't get caught in a situation where it is.)
- Marketing on behalf of the ***union as the client*** requires the wisdom and dexterity to win the union's support without losing the support of management. Many unions support basic skills programs. Some even have education and training requirements in their union contracts. Marketers need to investigate the relationship between education and qualifying for (or bidding on) jobs.
- Marketing to ***multiple parties*** (i.e., the employer *and* employees, or a consortium of small employers) requires multiple strategies. Each has a separate and distinct reason for participation which may not be a problem unless the reasons conflict. (That's why assessment is so important!) Your job is to show how each stakeholder group benefits, complements each other and helps the company compete.

For an excellent resource to help sort out the confusing topic of "Who is the client?", see *The Politics of Workplace Literacy A Case Study* by Cheryl Gowen, New York: Instructors College Press, (1992).

Basic Skills Advisory Team

It is strongly suggested that marketers encourage or otherwise convince employers to utilize a Basic Skills Advisory Team. Advisory teams facilitate internal communication and can be beneficial in evaluating and improving programs. The team knows the company environment and is able to identify and maintain necessary chains of communication. An Advisory Team can also provide the internal enthusiasm and drive needed to make the program succeed.

Working with an Advisory Team has an advantage over marketing to a single individual at the company: consistency. Managerial turn-over within companies, particularly in Human Resource Manager (HRM) positions, is tremendous. Working with an Advisory Team reduces the probability of having to start the marketing process at ground zero when an HRM leaves the company.

The marketer works closely with the Advisory Team and may become the liaison between the adult education provider (if different from the marketer) and the company. The marketer acts as an educational consultant who translates employer needs into educational objectives.

Advisory Teams generally include personnel from all levels of the company. Employees may or may be involved in the needs analysis segment of marketing. Often employee requests for GED classes or basic skills refresher courses provide the impetus for employers to sponsor a workplace basic skills program. If an Advisory Team exists, it should include one or more potential students.

The Basic Skills Advisory Team serves the following functions:

- Assists in the process of assessing needs;
- Assists in designing, developing, and evaluating the program;
- Assists with recruiting;
- Has decision-making authority or can influence those who do.

Assessment

Adult educators have defined assessment in many different ways. A brief sampling:

- *Assessment is the value-free ascertainment of the extent to which objectives determined at the outset of a program have been attained by participants.*
  Stephen Brookfield

- *Assessment refers to the gathering of information, or data collecting.*
  Janine Batzle

- The purposes of assessment*: (1) provides initial diagnostic information; (2) provides assistance in choosing methods and materials for instruction; (3) provides valid and reliable measurement of progress in the program.*
  Alan M. Frager

- *Most educators agree that assessment of critical literacy -- the higher level capabilities involved in comprehending, composing, and communicating -- is beyond the reach of group-administered paper-and-pencil tasks. These abilities emerge in the flow of complex activities performed by groups of students working under the instructor's guidance. The instructor is in a unique position to observe and document performance and understanding. Viewed in this manner, assessment is a daunting task, requiring both professional knowledge and wisdom.*
  S. Jay Samuels and Alan E. Farstrup

Simply stated, assessment may be defined as the process of determining where you are now and where you want to be at some time in the future. The role of the adult educator is to facilitate the movement between the two.

When establishing a workplace program, two very different areas of assessment must be considered: 1) assessing the workplace environment to determine what specific skills and skills levels are required for acceptable job performance, and 2) assessing individual employees to determine current competencies.

In the first instance, assessing the workplace environment, the employer assists the adult education provider in gathering information that can be used to jointly establish objectives for the program. Since this is part of the marketing process, this area of assessment is treated in this chapter, with an assortment of informal techniques and formal instruments described.

In the second instance, assessing individual employees, the adult educator uses familiar diagnostic tools to obtain critical information regarding employee skill levels. In some cases, this assessment is conducted as part of the marketing process to lend credence to the need for a program. In other cases, this assessment is not conducted until the program has actually been agreed upon, in which case it becomes part of the process of recruiting and selecting employee participants. For that reason, it is treated in the next chapter.

Once the program is in place and employee participants have been identified, the instructor may use the information on individual skill levels to choose methods and materials for instruction as well as for establishing baseline data to measure and document individual and group progress. This application thus becomes part of the delivery of instruction activity.

Developing an Assessment Plan

With the endorsement of the employer, the provider develops an assessment plan, taking the following practical and "political" criteria into consideration:

- reason for conducting an assessment
- informal assessment techniques available
- formal assessment instruments available
- company policy on employee assessment
- union policy on employee assessment

Once the provider has a well-thought-out proposal, the assessment plan is presented to the company representatives for their approval and support, fully prepared to address the following:

- what or who will be assessed
- techniques or instrument which will be used and rationale for their selection (NOTE: It is suggested that the provider prepare a chart or other graphic showing an analysis of the various assessment instruments available for a specific skill or outcome. This facilitates understanding and agreement on the selection from a "menu" of possibilities and also enhances the company's general understanding of the assessment process.)
- skill or outcome to be evaluated
- cost and who will pay for it
- general logistics
    - assessment schedule (dates, times, location, and targeted population)
    - materials and supplies needed
    - support assistance, if appropriate (proctors, aides, etc.)

Remember: Present the plan as a *recommendation*. The entire assessment process should be characterized by a continuing dialogue between the marketer/adult education provider and the employer representatives in which any or all of the following people may work together to shape an education/training program appropriate for that particular workplace:

- Marketer
- Adult Education Administrator
- Basic Skills Advisory Team
- Human Resource Manager
- Training Department Representatives
- Union Representatives
- CEO

Gathering Information for Assessment Purposes

Begin by collecting as much information about the workplace as possible. It is amazing how often a seemingly unimportant bit of information turns out to be the key to selling and then designing a workplace curriculum.

When gathering information, remember to observe the following guidelines:

- Stress confidentiality. Be sure you indicate that information shared with you will be used only for purposes of the course and will be kept confidential. Ask if the company would like you to sign a formal agreement protecting their proprietary information.
- Ask questions constantly.
- Assume that you do not have all the answers. View your job as that of an investigator. When you ask questions to collect information, listen on two levels:

to what is actually said and what is implied. Facilitate honest discussion with whomever is involved.

Informal Assessment Techniques

Various informal assessment techniques may be used to identify specific skills required for acceptable job performance. Among the Appendix items for this chapter are several lists of basic skills to look for. One of these lists has been reformatted so that is can be used by the adult educator to document findings.

- **Meet with the CEO or Plant Manager**. Determine the objectives for the program and elicit their support.

- **Develop a relationship with the Human Resource Manager and/or the Training Department**. It's important that the program complement and support other training programs in the workplace.

- **Focus/discussion groups** - Facilitated discussions may include sessions in which a cross-section of employees brainstorm a list of skills needed in their workplace today and those which are anticipated to be needed in the future. The group can then order the listed skills by broad categories and rank them by importance.

- **Interviews** - Talking confidentially with a cross-section of employees (including management and production workers and union representatives where appropriate) about the changing workplace and what skills are essential for success in the future. Interviews can be analyzed for trends and suggestions. Interview supervisors, particularly those who supervise front-line workers. Supervisors and mid-management folks usually know the skills or lack thereof of the employees they manage. Interview "expert workers" to determine the skills they believe are necessary in successfully completing their work tasks.

- **Observation/Tours** - Take the opportunity to learn about the company, its processes, skills needed to perform specific jobs, and work conditions. Ask about every process and the skills needed to complete it: Who does what? When? How does the person know what to do in different situations? Who is authorized to stop production and on what basis? How much are employees empowered to make decisions about work? Do they do so? Where are computers used and by whom? What skills (reading, writing, computing, etc.) are involved in each task? Ask about safety guidelines when you request a tour and be sure to follow them. (Wear safety glasses, rubber sole shoes, restrain hair, no loose jewelry etc.)

- **Collect written information**. Ask for copies of safety manuals, company newsletters, application forms, bulletin board charts and graphs, routing slips, and anything else they will give you. (Don't be pushy. Assure the employer that the information collected will be kept confidential and do so.) In many instances, company materials are written by individuals who are visual learners, comfortable with the written word. Often the reading level of employees is not taken into account in developing written materials.

- **Meet with the advisory team**. Facilitate assessment sessions brainstorming lists of hot buttons and issues and determine which can be traced to basic skills. Adult education techniques work well in this situation. Use post-it notes, flip charts, nominal group technique, etc. Ask leading questions and have teams brainstorm answers. Help the group order responses and rank them, in the process identifying where basic skills are needed and where deficits may exist.

Formal Assessment Instruments

At various times in the development of workplace basic skills programs, formal assessments are used for different purposes. Assessment tools may include both standardized and authentic instruments. The provider should gather a variety of assessment instruments and have an understanding of when and how each may be appropriately used. Information gained during the company assessment process can later be shared (where appropriate) with the instructor to facilitate the *employees'* educational program, and, in the larger context, the *employer's* education and training needs and goals.

Marketers and providers should approach the assessment process with questions, not answers. Just as no single basic skills program meets the needs of every company, neither does one assessment tool define education and training needs for every company.

Providers should also consider whether or not the agency has the expertise to deliver appropriate assessment tools for the company. In some cases, employers may choose an outside assessment process such as the those available through the Virginia Community College System, American College Testing (ACT), or other companies.

- **Job Task Analysis** - A formal assessment process whereby each step in a certain process is observed and analyzed. Expert workers are observed and interviewed and skills needed for particular jobs are defined. Appropriate training programs are then designed to teach skills needed for that particular job.

- **"Literacy Pays"** - A worksheet developed by New Readers Press leads an employer through a short quiz to determine if their bottom line is affected by low skills of employees. Copies of the quiz are available from New Readers Press Publishing Division of Laubach Literacy International, Box 131 Syracuse, NY 13210-0131.

- **FORECAST Readability Formula** - There are more than 50 readability formulas available. FORECAST is one of the more recently developed surveys and is easy to administer. Please note that basic skills classes are not always needed to address a literacy gap in the workplace. Some companies, upon becoming aware of the high level of written materials they produce have worked with adult education programs to be more clear and concise in the production of written materials.

- **Technical-Related Academic Career Competencies** - The TRACC program includes a criterion-referenced instrument to test each competency that is common to most trade areas. TRACC was developed at the Woodrow Wilson Rehabilitation Center in Fishersville, VA 22939 for the Department of Rehabilitative Services. It is also a useful workplace assessment tool. Information about TRACC may be obtained from Nancy Nolen at 540-332-7989.

- **Training Survey** - This survey is an adaptation of the Adult Education Information Sheet originally developed by the Extension Teaching and Field Service Bureau, The University of Texas at Austin. This survey provides gross placement information (Level I, II, III/GED) and is useful for giving employers a "snapshot" of reading and writing levels of employees. The training survey instrument included in the resource section has been administered to entire workforces with results reported to employers as follows: X% of the workforce reads and writes at Level I, X% at Level II, and X% at Level III. The instrument also provides valuable information regarding training needs for the employer.

- **"Working Smarter Productivity Check-Up"** - Developed by the National Alliance of Business in 1991, this assessment is useful for determining changing needs in the workplace. A short video accompanies the survey which is useful in promoting the need and value of workplace basic skills programs. An adaptation of NAB's survey is included in the resource section of this chapter. For additional information contact the National Alliance of Business, 1201 New York Avenue NW, Washington DC 20005-3917.

- **Work Keys** - The Work Keys System is designed to serve business, industry, and labor, and educational entities. Employers can use Work Keys to identify the skill requirements of jobs. This information can help them select or further train their employees. Educators can use the job skill information to develop appropriate curricula and instruction that targets the skills and skill levels needed in the workplace. Contact American College Testing (ACT Client Services, POB 168, Iowa City, IA 52243-0168 (1-800-967-5539)

Assessment Results

Results should be presented to the appropriate company representatives and/or the advisory team in a professional manner, with proper decorum and *savoir faire*, maintaining the confidentiality and dignity of those persons who were involved in the assessment process.

To evaluate the assessment process, ask (and answer) these questions:

- Did the assessment process yield useful information?
- Did the assessment process yield the information needed or would alternative assessments have been more appropriate?
- Was confidentiality of employee input/assessment maintained?
- Was the assessment plan followed? If not, why not?
- Were adequate resources available (time, materials, supplies, personnel)?
- Did assessment results impact the employer's decision to sponsor a basic skills program?
- Were the assessment results used to draft a proposal with tentative program objectives?
- Was the process appropriate in terms of time needed to administer and evaluate?
- Was the company willing to free up employees to participate in the assessment process?
- Were both management and employees involved in the evaluation process?

Based on the evaluation, the provider will determine whether or not the process should be modified. If modifications are needed, do so. Use evaluations to plan for future improvement. Be sure the Advisory Team is aware of evaluation materials (without compromising confidentiality of participants) and is involved in the re-design of successive programs.

The provider should be sure to keep informed of assessment tools and trends and revise the assessment plan as needed.

Evaluation

Evaluation of your marketing techniques is a key component of continuous improvement. It is easy to ignore the importance of gathering feedback on marketing strategies, but don't be tempted to do so. If you are adding new programs on a regular basis you are doing fine. If you are not, find someone who is and work with them to learn new marketing techniques. (Note: "Regular basis" is a relative term. It depends upon how much time is devoted to marketing. A full-time marketer with experience may add 8 to 10 new programs a year. Persons developing workplace programs on a part-time basis are often delighted with one or two.)

Don't feel the need to follow the same pattern each time or each year, but do evaluate! Following the evaluation of marketing techniques and strategies, the marketing plan should be revised according to the feedback received. With experience the marketer learns to adapt to changing environments and to know which tool to pull out of the toolbox!

- Ask a colleague to accompany you on a marketing call as an observer. Ask your colleague to listen to your presentation (not participate), make notes, and share with you afterward areas where you can strengthen your technique. Don't be defensive about feedback. Use it to improve technique.
- Send a formal questionnaire to companies you have worked with. This can be done whether or not they "buy" a program. Ask questions which determine if your message was delivered as you intended; if your attitude was professional; if you were pushy or too laid back. (Questionnaires or follow-up interviews can be made after the program is initiated, or after it ends. Were your sales promises accurate?)
- Meet with the Advisory Team for an evaluation session and solicit the Team's honest input. Include administrators and instructors in the session.
- Keep in touch with peers who also market and compare notes.

Marketing is a skill developed over time. Everything can be improved by learning from experience. Experiment with various techniques and strategies and find those which best suit your style. Incorporate new ideas and new business concepts into the marketing plan. Keep improving your technique!

List of Resources Located in the Appendix

2-1 "Business as a Foreign Language: Glossary of Terms for the Workplace"

2-2 "Workplace Jargon and Organization of Work." Presented at the Virginia Adult Education Meeting, Lynchburg, VA, October 27-29, 1993.

2-3 "Workplace Basics: How to Determine If You Need a Program." Adapted from "Working Smarter Productivity Check-Up," National Alliance of Business, 1991.

2-4 Basic Skills Advisory Team Information Gathering Questions

2-5 FORECAST Readability Formula. (Source: Jorie Philippi, *Literacy at Work: The Workbook for Program Developers.)*

2-6 Workplace Basic Skills Action Plan [Personalize to Company X]

2-7 Workplace Basics Advisory Committee (checklists)

2-8 Critical Skills Advisory Team Minutes (sample)

2-9 "Satisfied Customers": Regional Employers Keeping Competitive through Basic Skills Education (sample)

2-10 Marketing Basic Skills -- A Role Play. Presented at 1992 Petersburg VAILL.

2-11 Sample Basic Skills Workplace Partnership Agreement

2-12 A Conversation on Workplace Education with an Employer Representative, from Region XII Adult Education Program in Martinsville, VA, on January 17, 1995. Published as an article in June 15, 1995 issue of *Progress*.

2-13 "Instructor/Ethnographer in the Workplace: Approaches to Staff Development," 1994-97 College of Lake County National Workplace Literacy Program, Mary Kay Gee and Charlotte Ullman.

2-14 "A List of Basic Skills for the Workplace," in *Upgrading Basic Skills for the Workplace*, The Institute for the Study of Adult Literacy, College of Education, Pennsylvania State University. (4 pages)

Recruitment and Selection

CHAPTER PREVIEW: Recruiting class participants is another aspect of marketing. Although the adult education practitioner and the prospective employee students are the main participants, others may be involved in some decisions related to this phase. Choosing an appropriate formal assessment or informal instrument for the circumstances is important; therefore, the purpose and application of the instrument as well as information on the instruments, themselves, are presented.

2-15 "Applications of Reading Skills Found in the Workplace," *Performance Technology*, 1989.

2-16 "Applications of Writing Skills Found in the Workplace," *Performance Technology*, 1989.

2-17 "Applications of Computation and Problem-Solving Skills Found in the Workplace," *Performance Technology*, 1989.

2-18 Reformatted version of "Applications of Reading Skills Found in the Workplace" to aid documentation. (2 pages)

2-19 Reformatted version of "Applications of Writing Skills Found in the Workplace" to aid documentation. (2 pages)

2-20 Reformatted version of "Applications of Computation and Problem-Solving Skills Found in the Workplace" to aid documentation. (2 pages)

2-21 "WAGE: Essential Skills," (a list of basic skills), from Governor's Commission on Adult Literacy, Little Rock, Arkansas.

Recruiting Employees

When a workplace basic skills program is approved to go on-line, the program must be marketed to potential participants. It is important for employees to be convinced that:

- programs are offered with the intention of improving basic skills of the workforce (and for no other reason);
- programs are not offered to identify employees with low skills;
- work within the classroom remains confidential unless otherwise specified in the contractual agreement and explained to all participants;
- participants and the company will gain from the experience.

Employees enroll in workplace basic skills classes for a wide variety of reasons including (but certainly not limited to):

- Working toward promotion
- Encouragement from a supervisor
- Setting a good example
- Preparing for a lay-off
- Learning skills for life
- Learning skills necessary for the job
- Personal growth and satisfaction
- Support to a friend or relative
- Getting a GED/ High School/ External diploma
- Learning English
- Up-grading skills
- Making "points" with management
- Getting released from work
- Getting paid to attend

Often, employees enter the classroom as skeptics--they are skeptical of their own abilities to learn; skeptical that the instructor can teach them any better than previous instructors have; skeptical that there is not a hidden motive by the company for offering the class; and skeptical that the class will be any different than other education programs they have attended. Self-esteem may be low as may also be self-expectations. Some employees may be intimidated as they enter the classroom because this training/educational activity may have a different look and feel to them.

Assessing Individuals

Both formal and informal assessments provide instructors with information about student backgrounds and goals. They also provide crucial information about appropriate levels of instruction. Once this information has been gathered, it must be blended with the stated goals and objectives of the workplace program as they are identified.

As indicated earlier, assessment occurs at many times during the development process and for a variety of reasons:

- Early in the process, the provider may suggest an assessment of the workplace culture and company goals in relation to the basic skills of the workforce.
- The employer may wish to assess the workforce to determine if skill levels meet the needs for production of product or service and thus help determine whether or not a basic skills program is indicated.
- Some employers may have a clear understanding of need, but want to use assessment instruments to identify specific employee needs which will determine the content and structure of the program to be developed.

Selecting a Measurement Instrument

Measurement tools used to assess skill levels of individuals who may participate in workplace classes can include both standardized and authentic instruments. The provider should gather a variety of assessment instruments and have an understanding of when and how each may be appropriately used and how the results may be used by the instructor to facilitate the employee/student's educational program.

Deciding upon the appropriate assessment depends on a number of factors: goals of the class; reporting requirements for the employer; length of the program. The decision of which, if any, assessment instrument to use is best decided upon in conjunction with the program administrator and curriculum designer.

After assessment instruments have been gathered, it is essential to know how to select the most appropriate instrument(s). No single assessment tool fits every situation. In giving recommendations about assessment tools, give attention to:

- Validity and reliability of the instrument
- Skills being assessed
- Reading level of the instrument
- Whether the instrument is administered to an individual or in a group setting
- Time required to administer and score the instrument
- Method of reporting results (Are the results in a format which is useable to the provider/instructor such as equivalent grade level, stanine score, or skill level based on a specified continuum?)
- Cost (including purchase or duplication of the instrument, paying someone to administer and score the instrument(s) and preparing a report of the results and subsequent recommendations.)
- Americans With Disabilities Act (ADA) guidelines

The provider should be aware of the effects of specific learning disabilities, special needs or language barriers in relationship to the assessment tool and the results it yields. The person who administers the assessment may need to provide optional adaptations to the assessment instrument and the testing environment, and/or utilize alternative assessment instruments.

Formal Assessment Instruments (a partial and incomplete list)

- **ABE Information Sheet**
  - Developed by the Texas Department of Adult Education, the Information Sheet is a "quick and dirty" way to assess learners according to three levels.
  - The survey asks participants to fill in questions in three parts. Those who can complete Part I are considered Level I (0-4) learners. Those who complete Part II are considered Level II (5-8) learners. Those who successful complete Part III are considered at the GED level (9-12).
  - The original assessment and an adaptation for the workplace are in resource section.
  - The Texas ABE program has given permission for adult education providers in Virginia to duplicate this assessment.

- **ABLE (Adult Basic Learning Examination)**
  There are three levels to this instrument and each level has five or six sections. The sections cover vocabulary, reading comprehension, spelling, grammar (usage and mechanics), mathematics (number operations and word problems). Level 1 corresponds to grades 1 -4; Level 2 corresponds with grades 5 -8;and Level 3 corresponds with grades 9 - 12. This test may be administered to either groups or individuals. It is not timed, but each section takes the average adult 25 to 30 minutes to complete. Manual scoring is moderately easy and takes about five minutes per instrument.
  - Contact: The Psychological Corporation
    555 Academic Court
    San Antonio, TX 78204-1061

- **BEST (Basic English Skills Test)**
  BEST is an oral assessment of English skills which is competency based. There are two versions - the shorter takes approximately seven minutes per student to administer; the longer version about twenty minutes. The literacy portion is correlated to student performance level (SPL) descriptions, of which there are 10 levels.

- **CAPS**
  Type: Individual/Group
  Level: 7.0 - 13.0+

Time: 51 minutes
Contact: Edits
P O Box 7234
San Diego, CA 92167
Phone: (619) 222-1666
FAX: (619) 226-1666

CASAS
The CASAS Life Skills tests assess a student's ability to apply basic skills to "real life" situations, represented by pencil and paper, multiple choice questions. These items generally test the use of two or more basic skills in a functional context. Each item on the test measures a specific CASAS competency statement. These survey achievement tests provide for monitoring of group progress over a given period of instructional time.

- **CLOZE**
  Cloze tests are a quick way to determine the reading comprehension ability of participants on materials written at a specific level of difficulty. They are constructed by systematically deleting words from selected passages, then requesting test takers to fill in the blanks based on their comprehension of the running text. Results of cloze tests are good indicators of how individual learners will function with the curriculum being developed.

- **COPS**
  Type: Individual/Group
  Level: 7.0 - 13.0+
  Time: 30 minutes
  Contact: Edits
  P O Box 7234
  San Diego, CA 92167
  Phone: (619) 222-1666
  FAX: (619) 226-1666

- **Official GED Practice Test**
  - The Official GED Practice Tests help employees/students determine if they are ready to take the actual GED Tests.
  - The Official GED Practice Test is approximately one half the length of the GED test.
  - Comparing Practice Tests scores with the minimum scores required in your area will help the student/employee and instructor decide whether they are ready to take the full-length GED tests.
  - If scores are high, the employee/student has a good chance of passing the GED tests.
  - If Practice Test scores are low, the employee/student probably will need further study in one or more subject areas.

- The GED Practice Tests are available through local adult education programs or can be purchased by the employer or employee/student.

- **Portfolio Assessment**
  Portfolio assessment is an alternative form of assessment which involves instructors in gathering and interpreting measures of students' progress toward literacy goals. A student-centered, multi-measure portfolio assessment includes:
    - writing samples
    - instructor notes on strengths and needs
    - long-and-short term goals of the student
    - record of materials read
    - record of attendance
    - vocabulary list
    - students' self-evaluations

- **READ (Reading Evaluation-Adult Diagnosis)**
  Developed by Literacy Volunteers of America, Inc., the READ is a proven diagnostic tool for assessing adult students' reading needs and progress. It is most appropriately used with Level I (0-4th grade reading level).
    - Measures 10 levels of competency in word recognition in context, and in reading and listening comprehension.
    - Tests for word recognition and word analysis skills.
    - Measures recognition of sight words.
    - Measures recognition of letter names and sounds, digraphs, blends, variant vowels, consonant-vowel-consonant (CVC) clusters, silent letters.
    - Measures recognition of affixes and syllabication.
    - Tests on one-to-one basis or for a group screen in classroom use.
    - Comes with a reusable test book and one 50-page recording pad.
    - Type: Individual
    - Level: 0 - 5.5
    - Time: 30 minutes
  - Contact:
    Literacy Volunteers of America, Inc.
    5795 Widewaters Parkway
    Syracuse, NY 13214
    Phone: 1-800-582-8812
    FAX: (315) 445-8006

- **SORT (Slosson Oral Reading Test)**
  - The SORT determines a student's ability to pronounce words at different levels of difficulty.
  - The raw score equals the total number of correctly pronounced words from all lists.

  - Reading level is determined by converting raw scores to equivalent grade levels using a SORT table. (A quick way to determine reading level is to divide the raw score in half.)
  - Type: Individual
  - Level: 0 - 10.0+
  - Time: 5 minutes
  - Contact:
    Wide Range, Inc. (JASTAK)
    P O Box 3410
    Wilmington, DE 198004
    Phone: 1-800-221-9728
    FAX: (302) 652-1644

- **S.T.E.P.S. (Student/Instructor Evaluative Planning System)**
  S.T.E.P.S. brings the student and instructor together on a regular basis to evaluate progress and plan for the future. The process gives students the opportunity to become involved in the planning for learning goals and is a valuable tool in helping instructors gain direction about student goals.
  Sample interview process available from Adult Education and Literacy Resource Center, 1-800-237-0178.

- **TABE LOCATOR**
  The TABE Locator tests vocabulary and math and is used to determine which TABE form to administer. Many programs only use the Locator as a placement guide for students. The Locator gives sufficient information for the instructor to begin instruction at an appropriate level and reduces the possibility of text anxiety in new learners.

- **TABE (Test of Adult Basic Education)**
  - TABE Survey Forms come in four levels:

E (easy)	2.6 - 4.9 range
M (medium)	4.6 - 6.9 range
D (difficult)	6.6 - 8.9 range
A (advanced)	8.6 - 12.9 range

  - TABE tests reading, language, and math skills. The number of correct scores can be converted to scale scores and grade equivalents and scale scores can be converted to percentile ranks and stanines by using the Norms Table.
  - Based on the recommendations of loyal TABE users, new TABE versions 7 & 8 supports the same philosophies found in the best adult education programs -- it highlights numerous integrated objectives, features authentic items that focus on adult life skills, and provides correlations to predict success on the GED tests.
  - TABE 7 & 8 assesses a wide range of basic skills and concepts adults need to live and work. It includes items that focus on a variety of cultures and life

skills that are interesting and relevant to the test-taker. And, all items and passages are as free as possible from ethnic, age, and gender bias.

- Tests cover: reading, mathematics, language, and spelling.
- Type: Individual/Group
- Level: 2.6 -- 12.9
- Time: 2 hours 45 minutes
- Contact: CTB/McGraw Hill
  209 Ryan Range Road
  Monterey, CA 93940
  Phone: 1-800-538-9547
  FAX: 1-800-282-0266

- **TABE EspaZol**
  - TABE EspaZol gives educators and training professional the information to plan effective teaching/training programs for Spanish-speaking adults.
  - TABE EspaZol evaluates the fundamental skill levels of Spanish-speaking adults by measuring basic reading, mathematics, and language skills using content appropriate for adults.
  - The first instrument of its kinds, TABE EspaZol helps distinguish how well Spanish-speaking adults can read in their primary language, so that ESL instruction can be planned.

- **TALS (ETS Tests of Applied Literacy Skills)**
  - TALS includes three literacy scales: **Prose** (skills in reading and understanding information found in books, newspapers, and magazines); **Document** (skills in identifying and using information in tables, charts, maps, and forms); and **Quantitative** (skills in working with numbers in printed materials).
  - TALS utilizes actual printed forms and documents used in everyday context.
  - TALS score indicates types of tasks which can be successfully completed. The Raw score is the total number of correct answers from each section of the test. The Raw score can be converted to a performance level (NOT a grade level).
  - TALS is directly comparable to the National Adult Literacy Survey (NALS).
  - Type: Individual/Group
  - Level: Based on performance level
  - Time 2 hours (40 minutes per test)
  - Contact: Simon & Schuster
    Workplace Resources
    P O Box 1230
    Westwood, NJ 07675
    Phone: 1-800-223-2348 (to open account)
    1-800-223-2336 (for subsequent orders)

FAX: 1-800-445-6991

- **TOFEL (Test of English as a Foreign Language)**
  The TOFEL is administered world-wide to students interested in studying in the USA. It measures grammar, listening and writing English language skills. The TOFEL is NOT appropriate for use with adult education students seeking to learn English.

- **WRAT (Wide Range Aptitude Test)**
  - The WRAT has two sections (1) reading and (2) math.
  - The reading section tests ability to pronounce words at different levels of difficulty. The raw score is equal to the total number of correctly pronounced words. Reading level is determined by converting raw scores to equivalent grade ratings on the WRAT table.
  - The math section tests ability to work a variety of math problems at different levels of difficulty. The raw score equals the total number of correctly worked problems. Math level is determined by using the raw score to look up equivalent grade ratings on the WRAT table.
  - Type: Individual/Group
  - Level: Math = N.1 - 11.9; Reading = N.1 - 13.7
  - Time: Math = 45 minutes; Reading = 15 minutes
  - Contact: Wide Range, Inc. (JASTAK)
    P O Box 3410
    Wilmington, DE 19804
    Phone: 1-800-221-9728
    FAX: (302) 652-1644

List of Resources Located in the Appendix

3-1 Sample Memo from the Company (Recruitment Memo from the CEO)

3-2 Sample #1: Interest Survey

3-3 Sample #2: Interest Survey

3-4 Sample #3: Interest Survey

3-5 Sample #1 "One Pager" Marketing Tools: Drive Yourself to Success!

3-6 Sample #2 "One Pager" Marketing Tools: Announcing RDP's "Skills for Today"

3-7 Sample #3 "One Pager" Marketing Tools: Classes for Citizenship

3-8 Sample #4 "One Pager" Marketing Tools: Workplace Basics – Why Basic Skills?

3-9 Sample #5 "One Pager" Marketing Tools: Do You Want Free Help?

3-10 Sample #6 "One Pager" Marketing Tools: Quiers Ayuda Gratis?

3-11 Sample Introductory Comments to Potential Workplace Students

3-12 Assessment Tools (Abbreviated Summary)

3-13 Adult Education Information Sheet: General Placement at Enrollment

3-14 Adult Education Information Sheet (form)

3-15 Company XXX Training Survey. Adapted for the workplace from the Adult Education Information Form.

3-16 Worksite Information Form

3-17 Technical Skills Interest Survey

3-18 Sample Workplace Interview

3-19 Information Sheet Interpretation: Extension Teaching & Field Service

3-20 Training Survey [Customize for Company]

Funding and Contracting

CHAPTER PREVIEW: Successfully developing a contract with the client is a critical skill. Roles and responsibilities of all "players" need to be worked out and understood.

Basic Steps Involved in Funding and Contracting

The main objectives of the funding/contracting process are straightforward:
- locate money to pay for the basic skills program;
- negotiate agreements between or among stakeholders that are mutually satisfactory;
- clearly delineate who has responsibility for each service to be provided and when/how it will be provided.

Stakeholders

At the very least, the following stakeholders participate in the funding/contracting activity:
- Client (usually a business or industry but perhaps a union or community group)
- Funding source (if other than the client or provider)
- Provider

Other individuals may be involved depending upon the type of program being marketed. They may include any or all of the following:
- Assessor
- Curriculum designer
- Instructor

Establishing Communication around Contractual Issues

Logistics of the funding/contracting process must be determined. It can be helpful to develop a worksheet or formula which is appropriate to the fiscal restraints and requirements of all participants. Getting the information down on paper requires answers to a host of questions, including the following:

- Is there a mechanism in the provider's fiscal process to allow for receipt of payment from a business or industry? (Don't laugh! This issue has caused many problems for public school systems which sponsor adult education programs.)
- Does the fiscal process allow or require a built-in administrative/overhead/profit line?
- Who is authorized to negotiate and sign the contract?
- Who will be billed?
- How will the fee be paid? Up front? Upon completion of the course? In increments?
- Who should receive copies of the completed contract (i.e. each signatory? the instructor?)

Whether the program is provided through a partnership between the company and a public adult education provider or facilitated by a private contractor, a contract should be developed, agreed upon, signed by all parties, with copies distributed to all parties. The company usually retains the original copy.

Estimating Costs

Program price depends on many variables. Making accurate *guesstimates* becomes easier after the first few programs are underway. The practitioner begins to have a *feel* for program costs and, after careful investigation of company needs, can fairly accurately predict estimates. A word of caution: Don't ever set a firm price before all the program parameters are set. Any variation may throw off the actual cost and leave one of the participants "holding the bag."

An important part of the information gathering process is determining the direct and indirect costs to be included and/or excluded from the contract. These costs will move from direct to indirect depending on the individual program, funding source, and provider.

The following are generally considered *direct* costs:

- Assessment of employee skills
- Books/ materials
- Curriculum development
- Duplicating materials
- Salary for instructor and aide for actual contact hours
- Supplies (paper, notebooks, pencils, calculators)

These are typically considered *indirect* (but sometimes direct) costs:

- Administration
- Assessment
- Marketing
- Recruitment
- Overhead (rent, heat, power, lights, cameras, action)
- Salary for preparation time and staff development of instructor and aide
- Special instructor training

Assigning Financial Responsibility

After costs have been determined, the negotiating begins on who will pay for what. The following questions should be asked, and more importantly, answered:

- Who will pay for the program?
- If the cost is to be shared, who will pay what?
- Is the program being offered at cost or will the provider make a profit?
- If the provider seeks to make a profit, how much will the market bear?
- How much information will be disclosed in the contract? i.e. Will the contract list all costs, both direct and indirect? Only costs by major category? Only a bottom line lump sum? (*Note: There is no one correct answer. The circumstances will dictate which method is appropriate and will vary from program to program.*)
- If outside funding is required, who will apply for it? Who will identify potential funding sources? Who will write the request?

The authors of this *Guide* urge practitioners to market basic skills programs as a *product which is for sale*. Education is a commodity that business will pay for if they are convinced it is worth the investment.

Employers purchase products all the time. All they ask in return for their purchase is a quality product delivered in a timely and professional manner. In most cases employers who are convinced of the value of improved basic skills will pay for a product which will improve those skills. Every company's greatest asset is its workforce. Such an asset is surely worthy of investment.

In spite of this reality, some employers are reluctant to purchase basic skills services and must be persuaded to assume their share of the financial burden. Long before it is possible to estimate, an employer often asks, "What will a program cost?" Be careful not to over price or under price your services and product.

Identifying Funding Sources

There are a variety of funding sources for workplace basic skills programs including, but certainly not limited to:

- Corporate Offices
- Employers
- Government and community agencies:
  - Chamber of Commerce
  - Community College
  - Department of Social Services
  - Employment Commission

  - Head Start
  - Job Training Partnership Act (JTPA)
  - Private Industry Council
  - United Way
- Grants (federal, state, or private)
- Unions
- Other

Implementation

Once the contract has been negotiated, it may be finalized and implementation initiated by doing the following:

- Present the contract to the participating parties;
- Obtain necessary signatures; check local and legal language;
- Distribute copies to appropriate people and offices.

Evaluation

After the contract has been signed and the program started, begin the evaluation of the funding/contracting process. Involve the employer in the process. Determine whether the contract was reasonable and whether the financial arrangements were carried out to the satisfaction of all parties. To redesign the funding/contracting process according to the evaluation results, be sure to ask the following questions:

- Were costs accrued that were not considered during the contracting process?

  - Was there a tremendous amount of copying that was not anticipated?
  - Did the company expect that snacks would be served during class and that someone besides them was paying for them?
  - Was sufficient time budgeted for marketing, assessment, curriculum design, and staff development?
  - Did students need calculators that were not included in the budget?
  - If it's a GED program, did the contract include the cost of the GED test?

- Was the customer satisfied with the format of the contract?

  - Was sufficient information given?
  - Was the contract too long and complex?
  - Was the contract clear, understandable, and fair?

- Did the financial arrangements work?
  - Were the bills presented in a timely manner?

- Were bills paid on time?
- Were staff getting paid in a timely manner?
- Was the amount budgeted for administrative overhead sufficient to cover costs?

Make every experience an opportunity to learn from mistakes. This is particularly important if errors were made in the funding/contracting process. With time and care, the budgeting and contracting processes become simplified.

Curriculum Design

CHAPTER PREVIEW: The different types of basic skills programs now available are reviewed, and possibilities for incorporating them into the design of performance-based workplace curriculum are discussed. Potential "players" in the design process are defined: the business, industry, or government representative; the advisory team; the curriculum designer; the program administrator; and the instructor/facilitator. Tips for evaluating the design process are also included.

Curriculum Needs in a Changing Workplace

You're an adult educator who wants to establish a workplace program. Have you ever heard these terms?

participative management
self-directed workforce
high performance work systems
work "cells"
team-based management

Chances are that even if you are familiar with the words, you may still be confused about what they really mean. Essentially, they refer to the concept of involving ***all*** employees in ***all*** phases of work, a radical departure from established practices of days gone by.

In the organizational structure that existed in workplaces for decades, particularly in the manufacturing environment, work activities were divided into separate steps and each one assigned to individual employees in an "assembly line" set up. Workers were trained only for their specific step, and likely knew very little or nothing about the work that fellow employees were doing, or maybe even what the final product looked like.

If an employee had a question about the work being performed, the appropriate thing to do was to discuss it only with the supervisor. If other people needed to be consulted, for example, people up or down the line in other departments, the supervisor served as the "go between". Employees, themselves, were expected to stick with the task at hand and wait to hear back from the supervisor.

This structure made sense for years and years. In fact, American business prospered with this approach. And in many work environments it is still in place. But modernization of work equipment, technological developments, and the requirements of global competition have forced business people everywhere to reconsider these traditional practices.

Fundamental to this challenge to the "old way" is the evolution in people's attitudes about what a workplace should provide in terms of productivity for the employer and personal satisfaction for the employees. Is it possible that goods could be manufactured and services provided in such a manner that profits are increased ***and*** human resources made use of in a more meaningful way?

Team-based management promises such an alternative. In this structure, the supervisor functions as a coach who guides the team in its responsibility of running a total process. With facilitative assistance from a team leader, team members direct their own efforts. They may plan, organize, and schedule their work, identify problems and seek solutions, set goals, and develop strategies for improvement. The underlying reasoning is that the people who actually do the work can be the most effective contributors in deciding how the work should be structured and accomplished.

In spite of the potential benefits from this new arrangement, there are significant challenges. As employees become more "empowered", they use their minds more and are held accountable for the decisions they now have the responsibility to make. Typically, the skills required in the new workplace are more extensive than in the traditional one.

Some people are delighted with this change. It allows them to participate in ways they have wanted for a long time. Other people, especially those who prefer working alone and answering only for themselves, may find these changes frustrating. Understandably, when the self-managed team approach is introduced into a workplace, it's not unusual for some people to get "on board" more quickly than others. Individuals and work "cells" progress at their own rates, experiencing problems, setbacks, and victories along the way.

Training plays a strategic role in the new workplace scenario, in terms of how quickly changes can be implemented as well as how well they are received, both of which impact organizational success.

Much of the training conducted in the workplace has been and always will be related to skills intended to improve actual job performance. There is a good reason for that. Regardless of an employee's specific job, each person needs to know how to properly operate the equipment and use the tools that are necessary to do their job, whether that person is a bank teller, a fork lift operator, or a medical assistant.

However, as more and more workplaces create team-centered environments, there is a parallel need for increased knowledge and practice in working more effectively with each other, as individuals, and in groups. Not to mention that in this new workplace where there is an increased emphasis on workforce flexibility, employees must know their own individual jobs as well as learn those of fellow team members through cross training.

How can adult educators assume a viable role in helping employees be more capable and thus assist organizations in being more competitive? What do adult educators have in their existing repertoire of programs that can be immediately applied? What is available that can be easily and quickly customized? Will some curricula be needed that don't even now exist?

Basic Skills Programs: The Adult Education/Workplace Curriculum Continuum

There are many different types of basic skills programs to be considered as possibilities for the workplace. In this *Guide*, workplace basic skills programs refer to any adult education opportunity involving skills which are provided to employees in the context of their work.

One type that is quite familiar to the adult education practitioner is the traditional learner-driven program designed to meet the needs of the students as *individuals*. This curriculum emphasizes areas such as life skills and literacy/ABE/GED competencies:

Life skills. Those which enhance a person's ability to function effectively in society. Listed below are but a few examples of the myriad of possibilities.

- Time management
- Personal finance
- Personal grooming
- Obtaining a driver's license.

Literacy/ABE/GED. Basic skills and certificates indicating a level of competency.

- Reading and comprehension
- Literature
- Math
- Social Studies
- Science

A second type more commonly seen now in workplaces is the business-driven program customized for students as *employees*. In this *Guide*, workplace basic skills programs refer to any adult education opportunity involving skills which are provided to employees in the context to their work. Programs include, but are certainly not limited to:

Job-Specific. Adult education may address job-specific skills through curricula designed to improve skills needed to perform a specific task such as:

- Improved reading skills for "pickers" (those who select items from inventory and deliver to a particular location in the production facility).
- Reading, recognizing, and understanding safety signs and policies at Company X.
- Using Company Y's cash register.
- Memo writing for shift managers.
- Math for SPC or blue-print reading.

Critical Thinking. Because literacy is a moving target, employees must be literate in many areas. In today's competitive environment a highly valued skill is the ability to learn. Two areas of general workplace learning are:

- Information assessment skills
    - gathering information
    - analyzing information
    - critical thinking
    - problem solving
    - learning to learn

- Interpersonal skills
    - listening skills
    - oral communication
    - team skills
    - leadership development
    - consensus decision making

A third type of program is, more or less, a "hybrid" of the traditional and the workplace-centered in that it is customized to meet both student *and* employer needs:

> **Adult education using workplace materials**, where basic skills are learned through the use of written materials germane to that particular workplace. These programs involve the transfer of basic skills to the workplace. The curriculum may utilize:

- Company vision, mission, goals
- Workplace policies and procedures
- Insurance forms
- Material Safety Data Sheets (MSDS)
- Instruction manuals for machinery
- Statistical Process Control (SPC) charts and graphs
- Inventory reports
- Shipping routes
- Routing slips
- Location of customers and suppliers
- Hazardous Materials (Haz Mat) and Hazard Communications (Haz Com)

This *Guide* is based on the premise that all basic skills programs in the workplace fall along a continuum from student-centered to employer-centered. For the purposes of the *Guide*, we are calling this the Adult Education/Workplace Curriculum Continuum. (A visual of the Continuum is included in the Appendix.) While there may be elements of both traditional and customized programs along the continuum, the degree of customization is determined by the program's stated goals and objectives.

Pure adult education learning ends at this point, but broader workplace learning does not. Higher level workplace learning skills depend on a solid foundation in basic skills. For employees to gain maximum benefit from training programs in the workplace, solid basic skills make an excellent foundation. Basic skills programs are often designed to complement other training programs in the facility, including:

- Total Quality Management (TQM)
- Statistical Process Control (SPC)

- ISO 9000, QS 9000
- Advanced Team-Building

Linking Workplace Programs with Job Performance

As adult educators extend their customer base into the workplace, one fact must be kept forever in mind: A business, any business, exists to produce goods or provide services. For training to be viewed as a "value added" activity in the workplace setting, it must support that reality. Employee participants in a workplace program must be able to apply what they learn in a classroom environment to real-life situations on the job.

In the *Workplace Basics Training Manual*, Anthony Carnevale, Leila Gainer, and Ann Meltzer talk about this "performance-based training" and define it as "a systematic format of instruction in which skills to be learned are clearly defined for the trainee and designed to reflect the skills required to achieve and/or retain employment."

The challenge, then, for adult educators is to link all learning outcomes directly with ultimate job performance. This statement bears repeating. The challenge, then, for adult educators is to link *all* learning outcome directly with ultimate job performance. If this is true, if the workplace program curriculum must directly reflect the requirements of the job, does that mean that the traditional learner-driven programs which emphasize basics such as life skills and literacy/ABE/GED will be replaced by more business-driven programs that include job-specific training, critical thinking, and adult education using workplace materials?

No, it does not. Any adult educator will recognize that the traditional basics are the foundation for those skills that are more easily identifiable with workplace tasks. (For example, an employee may be required to use SPC on the job, but if an understanding of the fundamental concepts of math is not there, the employee may have great difficulty with SPC.) Thus, the critical role that adult educators can play in helping employers use training strategically to impact "the bottom line" is to help them see that traditional basics are embedded in routine job tasks, and must be mastered before higher level learning can be addressed.

Using Available Information and Simple Methods to Reveal Linkages

In an earlier chapter we discussed how adult educators can assess the workplace environment to determine what skills are required in the performance of various jobs. Readers were given examples of basic skills they should look for and provided forms on which to document their findings (see Appendix for Chapter 2).

This may be an appropriate method, or even the method of choice, in many circumstances, but since closer scrutiny may be needed to get a clear picture of the exact requirements for some jobs, we will re-visit that activity here.
Job Task Analysis is one of the formal assessments described in Chapter 2. Although it may be more time consuming than other methods, it is critical for tracing an obvious path, ie, "linkages", from the tasks performed in a job to any fundamental concepts that may be embedded in them. Included in the Appendix items for this chapter is a Job Analysis Matrix, a form that can be used to capture information during this process.

An explanation of each type of information to be entered on the matrix is as follows:

> ***Job*** refers to the title of the job where requirements are being studied.
>
> ***Step*** refers to the particular part of the job, each actual task.
>
> ***Knowledges*** refers to the body of information a person must have in mind to perform a job.
>
> ***Skills*** refers to physical actions that a person must do to perform a job.
>
> ***Attitudes*** refers to values and beliefs that guide behavior or habits that a person must practice while performing a job.
>
> ***Fundamental Concepts*** are the basic skills, the "underpinnings" which serve as the foundation for the actual job tasks.

By using a process such as this, adult educators can more easily see where the needs of a particular workplace fall on the Adult Education/Workplace Curriculum Continuum. It's also a useful method for uncovering *all* areas (not just the obvious ones) where basic skills are required. And finally, this process of analysis helps to ensure that the training adult educators provide is performance-based.

Verifying Initial Program Objectives with Results from Job Analysis Process

After information was gathered, checked, and re-checked during the assessment phase, a proposal was put together which clearly stated program objectives. It is crucial for the success of the program to re-visit program objectives before, during, and after the design phase. Why is this?

Objectives that are developed based on an assessment of the workplace environment are tentative because the available data at that point is somewhat superficial, although it may be meaningful. With the job task analysis process, the provider is able to move from an assessment of the general environment to a closer scrutiny of the specific jobs. And, as

an evaluation is made of employee competencies, the gap between *what is required in each job* and *what levels individuals are actually working at* is revealed.
Some ideas for clearly stated objectives are as follows:

- This class will prepare participants for the GED test. Each student will be assessed to determine current reading and math levels and a personal course of study will be designed for each participant. The class will include some group activities, but will primarily focus on individual instruction, much like a one-room schoolhouse. Texts will be purchased from . . . .

- This class will review basic math principles in preparation for blueprint reading. Participants will work in groups to learn and practice math concepts such as . . . and . . . . Blueprints from the company will be supplemented by standard adult education math texts.

- This class will develop critical thinking skills through the use of technical manuals from company's pay-for-skills program. The class will emphasize before-, during-, and after-reading strategies to decipher the manuals and will increase employee comfort level with the written word. The text will be designed specifically for the company and will incorporate technical manuals throughout.

- This class will emphasize basic math skills (arithmetic, charts and graphs, calculator use, square roots, decimals and fractions) as a precursor to statistical process control training. Company SPC charts will be utilized along with the math text . . . .

Company-Directed Logistics

The provider and the employer must communicate often and effectively, moving ever closer to an agreed-upon format for the basic skills course. Re-check this information and clarify assumptions on a regular basis. By ensuring that the following questions are clearly answered to the satisfaction of all partners, logistics of curriculum design should run smoothly:

Who will design/develop the curriculum? This could be the instructor, the program administrator, a person or company which specializes in the area, or other persons associated with the adult education/literacy program or the client company.

What is the time line?

- When should the first draft be presented to the program administrator and/or the company?
- When should be curriculum be finalized and approved?

- Who will do the training and when will the instructor be trained?
- When is the program scheduled to go on-line?

Is special training needed for the instructor? When will the instructor be introduced to the project partners (advisory team, curriculum designer, etc.)? When curricula for the workplace are customized, the instructor often benefits from training by/with the curriculum designer.

What support materials are needed for this program?

- Do participants require calculators, notebooks, paper?
- Is a TV or VCR needed?
- Will participants use workbooks?
- Will flip charts, tape, and markers be needed?

Who is responsible for what? After all logistical items are listed, clearly delineate who will take care of each item. Set time lines for completion.

- Sometimes employers prefer to order books directly but need recommendations and addresses from the provider.
- Some employers have calculators already available so they may not need to be purchased.
- Who will collect materials to be included in a customized curriculum?

How about the culture of the company? A key to constructing the best curriculum for a particular company depends upon the designer taking into account the culture of the company. Both curriculum and delivery method will depend in great part upon the answers to the questions raised during the information gathering process. For example:

- A 5-hour per week *Math for Blueprint Reading* class offered during the lunch hour will likely be quite different from one offered T/Th from 6:00 - 8:30 a.m.
- Classes which involve shift workers whose shifts rotate frequently are not as conducive to group work as those in which participants remain constant.
- Dynamics in a class of volunteers are quite different from those who are required to attend. (If it's an option, opt for volunteers.)
- If teams are used effectively in the company for production of work, they are usually quite effective in the classroom.
- Mid-level managers who see the need for basic skills classes may not enthusiastically support them when they are instructed to free up workers to participate AND keep productivity at the same level while employees are in class.

- CEOs who "walk the talk" and support short-term losses in favor of long-term benefits are a joy to work with. Those who don't, usually aren't.

Who Influences Curriculum Design?

Programs do not customize themselves. It takes investigation, hard work, time, and money to customize a curriculum to a specific workplace. Customized curriculum design involves, at a minimum, one or more persons representing the employer and one person representing the provider. (If only one provider is involved, it is preferable that it be the curriculum designer.)

Persons involved in the process may include:

- **Employer Representative**

  Workplace programs are introduced to the employer through a number of different avenues. Most often education and training programs are initiated and/or coordinated by the HRM or Training Department. Often, one individual from the company acts as the sole liaison with the provider. This process works, but can be strengthened by using an advisory team.

- **Advisory Team**
  An advisory team can play a key role in curriculum design. They help clarify the basic skills needed in that particular environment and help identify potential areas to avoid or make use of (i.e. a pay-for-skills program, the union, or "unofficial" power brokers within the organization). When the advisory team is utilized in the curriculum design phase, the result is more often than not a quasi-official infrastructure of support for the program.

- **Curriculum Designer**
  The curriculum designer may or may not be involved in the basic skills program in another capacity. At times, the program administrator also designs the curriculum. Sometimes it is the instructor who does so. In some cases the curriculum is authored by a person or company which specializes in curriculum design. Whichever model you follow, be clear at the outset who has primary responsibility for curriculum design and make that role clear to all other participants, particularly the employer. And, most importantly, be sure the person/company designing the curriculum has experience in adult education and/or training.

- **Program Administrator**
  The program administrator is a key component to the curriculum design process. The administrator ensures that sufficient funds are available to pay the designer for time spent gathering information and writing the curriculum. The

administrator works closely with the designer to ensure that once written, the program can be delivered. The administrator must hire the best instructor for the course and be sure that the instructor is well trained in adult education concepts, the language of the company, and the methodology being used in course delivery.

- **Instructor(s)**
  The instructor(s) should be identified as early in the design process as possible to ensure that s/he understands the goals of the program, the company's key players, and the environmental culture in which s/he will instruct. Once a program comes on-line, the instructor often becomes the main liaison between the employer and the administrator. Knowing who the key players are and being comfortable interacting with them smoothes the entire communication process.

What Do You Want the Program to Accomplish?

To determine if you are ready to start designing curriculum, ask these questions:

- Is there consensus among participants about the need for a program?
- Is there consensus about program goals?
- Is there consensus about program content?
- Has a specific issue or issues been identified which can be addressed through a basic skills course?
- If a customized program is the goal, has a theme been identified around which the program can be built?
- Is there agreement on course logistics?
- If agreement exists on these issues, does the provider have necessary expertise to design and deliver the course?

Once goals have been formalized and agreed upon (usually after much give and take), the curriculum designer is ready to begin blending:

- the culture of the company . . .
- with the goals of the program . . .
- with company-directed logistics (time, location, number of participants, etc.)

This is where the fun begins!

Finalizing Employer Requirements and Expectations

During the curriculum design phase any number of things may change, sending the designer back to the drawing board. If, for example, mid-level managers want line workers to better understand SPC charts but the CEO has her heart set on a GED program, some work remains to be done. A few real-life examples from Virginia companies illustrate this point:

- A new plant manager wants to take the program in an entirely different direction.
- It's time for contract negotiations between the company and the union. The union now wants to be an active partner in program design.
- Production schedules increase or decrease, necessitating scheduling changes.
- The HRM, your only contact with the company, moves and doesn't leave a forwarding address. (Then you wish you'd had an advisory team!!!!!)
- New equipment necessitates a change in training priorities. Basic skills moves from the top to the bottom of the priority list.
- The company learns more about basic skills options and their goals evolve into something new.
- The advisory committee doesn't understand why you can't guarantee that x number of employees will have their GED certificates in 10 weeks.

Conclusion: Stay in close contact with the appropriate company representative (the advisory team, company liaison, etc.) and other "stakeholders" to re-check assumptions. The last thing you want is to present a fully developed curriculum before the employer has had the opportunity to give feedback and determine if the program is on target. It will save a lot of time and effort in the long run.

Evaluation

When evaluating curriculum design, it may help to break the evaluation into sections corresponding to the writing process. Separating the process for evaluation purposes will help identify needed improvements. If the evaluation says only "Was the course good, bad, or indifferent?" you may not collect usable information. If each part of the process is evaluated, however, you will gain more information for the continuous improvement process.

- Does the curriculum address the stated goals and objectives?
- Are the goals, objectives, and strategies outlined in the curriculum?
- Was the curriculum presented in a professional manner (on paper and by the instructor)?
- Is the curriculum user-friendly for the instructor?
- Is the curriculum manageable and achievable in terms of time allotted?
- Was it reviewed by all partners before going on-line?
- Does the curriculum correspond to the culture and philosophy of the company in which it is delivered?
- Did the program meet its objectives?
- How do we know if the curriculum made an impact on the employees' workplace? Did they show improvement? In what ways?

Use a variety of people to evaluate the curriculum design process. Especially, be sure that all parties involved with the program evaluate the curriculum design process: the advisory team, the instructor, participants, the administrator.

Use evaluation information to re-design before the class is offered again.

List of Resources Located in the Appendix

5-1	Sample Evaluation Form for Curriculum Design Phase
5-2	Adult Education/Workplace Curriculum Continuum
5-3	Job Analysis Matrix
5-4	Example of a List of Tasks Required in a Job (3 pages)
5-5	"Reading" Skills Required in a Workplace: Example #1
5-6	"Reading" Skills Required in a Workplace: Example #2
5-7	Identifying *Knowledges* and *Skills* Required in a Job
5-8	Where to Get Additional Information: Names and Addresses of National Professional Organizations

Staff Development Resources

CHAPTER PREVIEW: The identification and preparation of the teaching staff may be the most critical component of the workplace basic skills program. Suggestions are made for finding instructors and orienting them to the program and the workplace environment.

Roles and Responsibilities around Staff Development

The Program Administrator:

The program administrator has ultimate responsibility for staff development. For workplace programs, the administrator may utilize a trainer, and/or representatives from the client company.

The Employer:

Employers may or may not wish to be part of the instructional staff selection and training process. If it would be beneficial to do so, include the employer in the process. At times companies may suggest using an in-house instructor to teach the basic skills course. If the in-house instructor has a background in adult education, this may work. If he or she doesn't, suggest a co-facilitation process with an adult educator and an in-house trainer, ensuring that adult education practices will be used to present materials from the workplace.

The Provider:

Most often it is the responsibility of the ***provider*** to identify, hire, and train the best possible instructor(s). The identification of instructional staff may be the most critical component of the workplace process since the delivery of instruction determines both the quality of the entire program and, often, participant retention.

The Trainer:

Trainers are essential to the success of any workplace program and should be chosen carefully. For workplace basic skills programs, trainers assist educators in adapting educational practices to the language and culture of the workplace. Trainers of workplace basic skills instructors should possess:

- Prior successful results in the training of instructors. (Good instructors may or may not possess the skills necessary to be effective trainers.)
- A thorough knowledge of the culture and language of both adult education and business and industry.
- The ability to model for instructors the best possible education/training techniques including:
  - active learning
  - cooperative/team learning
  - a variety of instructional strategies to meet the needs of all learning styles
  - multi-tasking
  - integrated learning

- facilitation techniques to develop critical thinking and problem solving abilities

Recruitment and Selection of Instructors

Recruiting instructional staff may be as easy as identifying an existing pool of interested, experienced professionals who can move easily into the work environment and adapt their teaching styles to the needs of the workplace. Or it may be as difficult as recruiting and training inexperienced personnel to work in a completely new environment. The recruitment process may include:

- Advertising
- Individual contacts
- Referrals
- Utilizing current staff
- The grapevine

The selection of the instructor should be made by the Program Administrator with input, as appropriate, from a variety of others, that may include:

- The Regional Planner/Specialist
- The Adult Education Coordinator
- The Company Advisory Team
- The Marketer
- The Curriculum Designer
- Other appropriate decision makers

Based on the application and interview process, select instructor(s) who can best meet the needs of the business, industry or government employer and its employees/students. Look for instructors who have:

- an appropriate academic background
- experience teaching and/or training adults
- proven success with adult learners
- an understanding of who the client is
- knowledge of resources
- understanding of and appreciation for cultural diversity
- knowledge of the adult learner (andragogy)
- an understanding that the goal of business and industry in the United States is maintaining profit.

In addition, workplace instructors should be:

- Enthusiastic

- Flexible
- Sensitive
- Great listeners
- Creative
- Adaptable

Preparation of Instructors

After months (and sometimes years) of groundwork and planning by the marketer, employer, administrator, and curriculum developer, it's finally time for classes to begin. The spotlight now turns to the instructor/facilitator upon whose shoulders much responsibility rests.

Every instructor sent into a workplace should have a full appreciation of the environment in which he or she will be working, and knowledge of the key supporters of the program, the company contact, and background on how participants were recruited and selected.

When the instructor enters the class for the first time, he or she should already have received a tour, background information about the company, staff development training which incorporates site specific curriculum development, and detailed information about the goals and objectives of the course and culture of the company. It is certainly possible to teach adult students in the workplace without this background information, but the task of the instructor becomes much easier if he or she is able to move quickly into the workplace culture.

Who conducts the training?

Instructional staff should be trained by someone with experience in workplace education, which may include a host of people such as:

- Regional Planners
- Regional Specialists
- Employee Development Services
- Private and public Literacy/ABE/GED providers
- Professional workplace trainers
- Employer representatives
- Other appropriate staff development personnel

Identification of Instructor Training Needs:

After the instructor is selected, the training needs for that person must be determined. It's vital that workplace instructors have as much information about the genesis of the workplace basic skills program as possible. Information gathered during the marketing, assessment, contracting, and curriculum development phases should be shared with the instructor.

Remember, staff training and development should be designed to enable the instructor to meet the program's stated objectives. In making this determination, consider the curriculum to be presented. If it involves team-based learning, make sure the instructor has training using a team-based approach.

What content should be included in the instructor training?

- program goals and objectives
- administrative responsibilities
- academic/teaching responsibilities
- name, address, telephone, voice mail, fax numbers, and e-mail addresses of all participating parties, especially the curriculum designer
- linkage responsibilities between project partners
- administrative and reporting procedures
- evaluation procedures
- follow up procedures
- understanding the culture and language of business
- history of the company in the community
- information about the company's products/services and customers
- knowledge of the culture of the particular company where the program is to be held
- immediate goals of the company and the particular program
- the philosophy, including the vision and/or mission statement, and long range goals of the company
- an understanding of the specific workplace environment
  [A facility tour is a must. Hint: Instructors should, if at all possible, tour the facility before the program begins and after the class has started. Meet with the manager, the company contact person, and union official, if applicable. Be seen on the shop floor when and where possible. Know and cheerfully follow safety policies (ie, areas where hard hats, safety glasses, steel-toed shoes, and ear plugs are required). Safety regulations and a company handbook are invaluable for the instructor/facilitator as well.]
- the design and parameters of the program
- desired program outcomes for the employer, employee/students, curriculum designer, program administrator, advisory team, and instructor

- how to use unfamiliar curriculum materials, assessment instruments, and computer software
- awareness of privacy issues and confidentiality.
- the role of the instructor as part of the planning process with the marketer/designer and the employer advisory team
- how the program was marketed to employees to determine if further information is needed

Additional Suggestions for Instructor Training:

- Be sure that all appropriate participants are available for the training session. Whenever possible, include representatives from the client company.
- Reserve an adequate block of time.
- Conduct training in a quiet atmosphere where participants will not be disturbed by telephones, fax machines, or other interruptions.
- Have all materials available that will be used in both the training session and the actual course.
- Model good training practices.

Evaluation

Be sure to evaluate the staff development process from the perspective of all partners in the venture. In addition, ask the instructor to evaluate the staff development process during and following the course. Incorporate all that you learn from the evaluation process into the next staff development session. A de-briefing session is extremely valuable for collecting information which will improve future programs, particularly when curriculums are customized. Adhere to the principal of continuous improvement for quality programs.

List of Resources Located in the Appendix

6-1 Workplace Basic Skills Instructor Questionnaire

Delivery
of
Instruction

CHAPTER PREVIEW: The delivery of instruction determines both the quality of the entire program and participant retention. It is critical for the instructor to successfully address the goals and objectives of the employer with the personal goals and skill levels of program participants. It is equally important for participants to clearly understand employer goals and objectives and to be involved in setting individual goals and class guidelines. Ideas for subsequent program evaluation are suggested.

Workplace Training -- A New Experience for Adult Educators

For any workplace class, implementation of the program is the heart and soul of the process. Instructors who have worked in both public classes and workplace classes prefer the workplace classes in almost every instance. They find participants to be highly motivated, supportive of each other, pleased that the company is giving them an opportunity, and open to trying new approaches to learning.

Analysis of program background guides the instructor in the method to use in the workplace classroom. Instruction is geared to the goals of the program (both stated and unstated), the academic level of participants, and the corporate culture.

Again, there is no one "right" way to teach in a worksite. However, instructors should remember that much of the sound methodology they have practiced in other settings should also be applied in the workplace, along with additional behaviors. Think of the following as a "checklist":

Organization and Development:

- Begin each session by stating what will be taught.
- Explain the general purpose of the training before getting into details.
- State the purpose of the training and link it to the job in the workplace.
- Relate the purpose of the training to quality efforts in the workplace.
- Relate the purpose of the training to safety concerns in the workplace.
- Develop ideas in an orderly sequence.
- Describe one step at a time.
- Explain each step in detail.
- Use documentation from the workplace appropriately.
- Complete the lesson in the time allowed with appropriate time spent on each part.

Communication and Delivery:

- Speak clearly and briefly.
- Use simple and easy-to-understand language.
- Explain technical terms or jargon.
- Exhibit patience.
- Maintain eye contact with trainees.
- Use gestures appropriately.
- Vary pitch in voice.
- End each session with a positive comment.

Interaction with the Trainees:

- Encourage trainees to feel comfortable.
- Ask trainees questions to check understanding.
- Urge trainees to ask questions.
- Respond when a trainee asks a question or makes a statement.
- Encourage each trainee on efforts to participate and contribute.
- Allow each trainee an opportunity to elaborate on how learning relates to job.
- Repeat instructions when asked (in another way, if necessary).
- Do not interrupt a trainee.
- Relate to each trainee as an equal.
- Relate the outcomes of the training to quality efforts in the workplace.
- Relate the outcomes of the training to safety concerns in the workplace.

Goals and Objectives of the Workplace Program

It is imperative that the instructor know where the workplace class fits on the Adult Education/Workplace Curriculum Continuum because this placement provides the direction; i.e. goals and objectives, for the program.

Programs designed to meet goals on the left end of the continuum are learner-driven. Often, although not always, instruction is individualized. However, group exercises and student participation are highly recommended because they provide valuable opportunities to include workplace materials and tailor learning to the work environment and culture.

Programs designed on the right end of the continuum are business-driven and should be designed and taught/facilitated according to the stated goals and objectives of the class. This is not as easy as it sounds because in some instances student perception of the purpose of the class is quite different from that of management.

Clarifying Employer Goals and Objectives

In most cases, the class objectives will be clearly articulated during the curriculum design phase. If this is the case, the instructor should review the objectives as part of discussion during the first class. Employees may be confused about why the class is being offered and what the goals are. (The message sometimes gets lost between the marketing and implementation phases of the program development process.)

If programs are marketed as "basic skills refresher," setting class objectives makes a good first session. In workplaces where teams are used to accomplish work, having small groups brainstorm about their goals for the program and ways it might improve the workplace can also lead to a clear statement of class goals. If the course is to be individualized; i.e. GED preparation, spend some time talking about how the class will operate.

Establishing Individual Goals and Class Guidelines

General logistics of the class should be set prior to the start of class; however, in some instances employers offer participants choices, such as which days and at what time the class will meet. Since adult learners have not usually had much experience controlling their own education process, setting class guidelines is a terrific way to get them started doing so. It is suggested that participants develop their own guidelines on such items as:

- breaks
- food
- absences (providing it has not been set by the company)
- helping others with work
- correcting mistakes
- participation in discussions

Note: If the instructor or company has guidelines which must be followed, be sure to state them up-front and indicate that these items are not up for discussion. Such things as the smoking policy and safety regulations fit into this category of class guidelines.

When guidelines are finalized, have them copied onto flip chart paper and posted on the wall during all class sessions. Whenever a logistical dispute arises, the facilitator can refer to the guidelines for clarification. Items raised not covered by the guidelines can be added at any time.

Stress that this class will be unlike those most people experienced in school. A good first class exercise is to ask small groups to brainstorm a list of characteristics of school as they remember it. These can be shared and categorized. The instructor can then go down the list and state objectives of the class in juxtaposition with "school" characteristics.

End-of-Program Evaluation

Teaching is a skill which needs fine-tuning. Use information collected during the evaluation phase to improve classroom instruction style. Feedback on evaluation of the instruction can be gathered in numerous ways. Just as in public adult education settings, workplace evaluation should encompass the many evaluative tools that are within the realm of creative, flexible adult workplace educators.

Some evaluative techniques are listed below. There are many more to be considered.

- Survey employees (those who did not finish as well as those who did)
- Participation rate
Attendance record
- Portfolio evaluation
- Daily comment sheets ("*What did you like best about today's session?*", "*What did you like least?*", "*What would you like to see included our sessions?*")
- Learning contract ("*Did we do what we said we would do?*")
- Self esteem - before/after
- Pre-/post- expectations of management
- Standardized evaluation forms
- Anecdotal accounts
- Comments from supervisors about the program's effectiveness
- Group evaluation (especially if teams were used during the class)
- Evaluative staff meeting

As with all other steps of the workplace basic skills program development process, teaching techniques can and should be constantly improved. Use information generated by the evaluation process to refine workplace teaching skills. Attend professional development seminars. Learn and share with others, particularly your students!

List of Resources Located in the Appendix

7-1 Sample Introductory Comments to Workplace Students

7-2 Learning Style Characteristics

7-3 Learning Style Tips

7-4 Learning Style Preference

7-5 Workplace Teaching Tips

7-6 Workplace Math Problems (sample)

7-7 Lifelong Learning Evaluation Survey #1: XXXX Industries, Inc.

7-8 Workplace Class Evaluation Survey #2

7-9 Sample Evaluation Results: Basic Math Skills Class

7-10 Tips for Effective (Lively and Exciting) Training

7-11 Workplace Education versus Adult Basic Education, from "Instructor/Ethnographer in the Workplace: Approaches to Staff Development," Mary Kay Gee and Charlotte Ullman, 1994-97 College of Lake County National Workplace Literacy Program.

Appendices

Appendices

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Introduction

Int-1 The Workplace Workgroup
Int-2 Evaluation Form for guide
Int-3 Resources
Int-4 Regional Planners and Specialist
Int-5 VA Department of Education, Adult Education and Training

Chapter 1: Understanding the Need

1-1 *The Missing Link*, Southport Institute for Policy Analysis. (Selected excerpts published in the Business Council Effective Literacy Newsletter, July, 1992.)
1-2 Introduction to *Workplace Literacy: Reshaping the American Workforce*. (US Department of Education, Office of Vocation and Adult Education, Division of Adult Education and Literacy, May, 1992.)
1-3 *National Adult Literacy Survey (NALS)*: Report Summary
1-4 "Educational Characteristics of Persons over 25 in the New River Valley: 1990 Census" (sample handout)
1-5 Characteristics of Today's and Tomorrow's Workplace, from *What Work Requires of Schools: A SCANS Report for America 2000.* Original Source: "Competing in the New International Economy," Washington Office of Technology Assessment, 1990.
1-6 Bibliographical information on *Workplace Basics: The Skills Employers Want*
1-7 Bibliographical information on *What Work Requires of Schools: A SCANS Report for America 2000*
1-8 Bibliographical information on *The State of the South: A Report to the Region and Its Leadership*, MDC, Inc., April, 1996.

Chapter 2: Marketing and Assessment of Training Needs

2-1 "Business as a Foreign Language: Glossary of Terms for the Workplace"
2-2 "Workplace Jargon and Organization of Work." Presented at the Virginia Adult Education Meeting, Lynchburg, VA, October 27-29, 1993.
2-3 "Workplace Basics: How to Determine If You Need a Program." Adapted from "Working Smarter Productivity Check-Up," National Alliance of Business, 1991.
2-4 Basic Skills Advisory Team Information Gathering Questions
2-5 FORECAST Readability Formula. (Source: Jorie Philippi, *Literacy at Work: The Workbook for Program Developers.)*
2-6 Workplace Basic Skills Action Plan [Personalize to Company X]
2-7 Workplace Basics Advisory Committee (checklists)
2-8 Critical Skills Advisory Team Minutes (sample)
2-9 "Satisfied Customers": Regional Employers Keeping Competitive through Basic Skills Education (sample)
2-10 Marketing Basic Skills -- A Role Play. Presented at 1992 Petersburg VAILL.
2-11 Sample Basic Skills Workplace Partnership Agreement

2-12 A Conversation on Workplace Education with an Employer Representative, from Region XII Adult Education Program in Martinsville, VA, on January 17, 1995. Published as an article in June 15, 1995 issue of *Progress*.

2-13 "Teacher/Ethnographer in the Workplace: Approaches to Staff Development," 1994-97 College of Lake County National Workplace Literacy Program, Mary Kay Gee and Charlotte Ullman.

2-14 "A List of Basic Skills for the Workplace," in *Upgrading Basic Skills for the Workplace*, The Institute for the Study of Adult Literacy, College of Education, Pennsylvania State University. (4 pages)

2-15 "Applications of Reading Skills Found in the Workplace," *Performance Technology*, 1989.

2-16 "Applications of Writing Skills Found in the Workplace," *Performance Technology*, 1989.

2-17 "Applications of Computation and Problem-Solving Skills Found in the Workplace," *Performance Technology*, 1989.

2-18 Reformatted version of "Applications of Reading Skills Found in the Workplace" to aid documentation. (2 pages)

2-19 Reformatted version of "Applications of Writing Skills Found in the Workplace" to aid documentation. (2 pages)

2-20 Reformatted version of "Applications of Computation and Problem-Solving Skills Found in the Workplace" to aid documentation. (2 pages)

2-21 "WAGE: Essential Skills," (a list of basic skills), from Governor's Commission on Adult Literacy, Little Rock, Arkansas.

Chapter 3: Recruitment and Selection

3-1 Sample Memo from the Company (Recruitment Memo from the CEO)
3-2 Sample #1: Interest Survey
3-3 Sample #2: Interest Survey
3-4 Sample #3: Interest Survey
3-5 Sample #1 "One Pager" Marketing Tools: Drive Yourself to Success!
3-6 Sample #2 "One Pager" Marketing Tools: Announcing RDP's "Skills for Today"
3-7 Sample #3 "One Pager" Marketing Tools: Classes for Citizenship
3-8 Sample #4 "One Pager" Marketing Tools: Workplace Basics – Why Basic Skills?
3-9 Sample #5 "One Pager" Marketing Tools: Do You Want Free Help?
3-10 Sample #6 "One Pager" Marketing Tools: Quiers Ayuda Gratis?
3-11 Sample Introductory Comments to Potential Workplace Students
3-12 Assessment Tools (Abbreviated Summary)
3-13 Adult Education Information Sheet: General Placement at Enrollment
3-14 Adult Education Information Sheet (form)
3-15 Company XXX Training Survey. Adapted for the workplace from the Adult Education Information Form.
3-16 Worksite Information Form
3-17 Technical Skills Interest Survey
3-18 Sample Workplace Interview
3-19 Information Sheet Interpretation: Extension Teaching & Field Service
3-20 Training Survey [Customize for Company]

Chapter 4: Funding and Contracting

4-1 Sample Budget Worksheet
4-2 Sample Consultant Agreement
4-3 Sample Instructor Letter of Agreement
4-4 Sample Workplace Education Agreement Between the Adult Education Program (AEP) and the Workplace Institution
4-5 Reviewing an RFP: Three Critical Steps
4-6 "Tips on Grant Writing" by Susana Mincks. Published in *Professional Tips for Adult and Continuing Educators*, AAACE publication.
4-7 "Funding Today – Make Your Proposal Narrative Reviewer-Friendly" by Jacqueline Ferguson, *Education Grants Alert*, May 28, 1991.
4-8 "Proposal-Writing by the Numbers: ED's Grant Scoring System," *Education Grants Alert*, May 28, 1991.
4-9 "Make Proposals Stand Out To Beat Competition, Expert Says," *Education Grants Alert*, May 28, 1992.

Chapter 5: Curriculum Design

5-1 Sample Evaluation Form for Curriculum Design Phase
5-2 Adult Education/Workplace Curriculum Continuum
5-3 Job Analysis Matrix
5-4 Example of a List of Tasks Required in a Job (3 pages)
5-5 "Reading" Skills Required in a Workplace: Example #1
5-6 "Reading" Skills Required in a Workplace: Example #2
5-7 Identifying *Knowledges* and *Skills* Required in a Job
5-8 Where to Get Additional Information: Names and Addresses of National Professional Organizations

Chapter 6: Staff Development Resources

6-1 Workplace Basic Skills Instructor Questionnaire

Chapter 7: Delivery of Instruction

7-1 Sample Introductory Comments to Potential Workplace Students
7-2 Learning Style Characteristics
7-3 Learning Style Tips
7-4 Learning Style Preference
7-5 Workplace Teaching Tips
7-6 Workplace Math Problems (sample)
7-7 Lifelong Learning Evaluation Survey #1: XXXX Industries, Inc.
7-8 Workplace Class Evaluation Survey #2
7-9 Sample Evaluation Results: Basic Math Skills Class
7-10 Tips for Effective (Lively and Exciting) Training
7-11 Workplace Education versus Adult Basic Education, from "Teacher/Ethnographer in the Workplace: Approaches to Staff Development," Mary Kay Gee and Charlotte Ullman, 1994-97 College of Lake County National Workplace Literacy Program.

The Workforce Group

Judy Bailey-Kinker
7434 Srain Ave.
Mechanicsville, VA 23111-5915
804-236-4369

Brenda Bryant
ALC/Pride Center
1200-1208 Polk St.
Lynchburg, VA 24504
804-522-3761

Charles Goodman
Marketing Director
Smyth County Education Foundation
Rt. 1 Box 102
Atkins, VA 24311
540-783-1777

Bill Greene
22 Canary Drive
Danville, VA 24540
804-836-0506

Glenda Harrell
PO Box 9175
Greensboro, NC 27429
910-545-1385

Dot Hayes
Adult and Continuing Education
The Jefferson Center
541 Luck Ave. SW Suite 330B
Roanoke, VA 24016
540-853-2151

Betsy Mathias
Independent Trainer
Spotsylvania Vocational/Tech Center
Spotslyvania, VA 22553
540-898-8165

Dale Temple
Regional Adult Education Planner
Southside Programs for Adult and
continuing Education
6610 Commons Drive Suite 101
Prince George, VA 23875
800-321-6081

Steve Veno
Adult Education Workplace Coordinator
The Pride Center
1200-1208 Polk St.
Lynchburg, VA 24504
804-522-3742

Stacey Wright
Regional Adult Education Program Planner
Adult Learning Center
22 Baltimore Ave.
Danville, VA 24541
800-804-6357

INT - 2

Workplace Guide Feedback Form

We welcome your feedback in assisting us in continuing to improve and update this guide.

1). What is your overall impression of the guide?

2). How did you use the guide to assist you in planning and implementing programs?

3). What suggestions for improvement would you make for this guide?

4). What additional information would you include in this guide? Be specific.

5). What did you like least about this guide?

6). Other comments and suggestions:

(Optional): Your Name:______________________________
Phone Number:___________________________

Please mail or fax to:
VA Adult Education & Literacy Resource Center
1015 W. Main Street, Box 842020
Oliver Hall, Education. Bldg., Room 4080
Richmond, VA 23284-2020
(804) 828-7539 FAX; (804) 828-6521; 1-800-237-0178

INT - 3 (2 pages)

Resources

The following resources are among those available to assist the adult educator:

- **Education Resources Information Clearinghouse (ERIC)**
  U.S. Department of Education
  Office of Educational Research and Improvement
  555 New Jersey Avenue NW
  Washington, DC 20208-5720
  Telephone: (202) 219-2289
  Email: eric@inet.ed.gov

- **National Alliance of Business**
  12021 New York Avenue NW
  Washington, DC 20005
  Telephone: (202) 289-2936
  Fax: (202) 289-1303
  Internet: www.NAB.com
  Email: INFO@nab.com

- **National Clearinghouse on ESL Literacy Education**
  Center for Applied Linguistics
  1118 22nd Street NW
  Washington, DC 20037-1214
  Telephone: (202) 429-9292 x200
  Internet: www.cal.org/ncle
  Email: ncle@cal.org

- **Regional Program Planners and Regional Specialist**
  (See INT - 4)

- **Virginia Adult Education and Literacy Centers**
  Virginia Commonwealth University
  1015 W. Main Street
  P O Box 842020
  Richmond, VA 23284-2020
  Telephone: 1-800-237-0178
  Fax: (804) 828-7539
  Internet: www.vcu.edu/aelweb/
  Email: sjoyner@saturn.vcu.edu

- **Virginia Council for Adult Education and Literacy**
  Rosallen McMath
  P O Box 2120
  Richmond, VA 23218
  Telephone: (804) 225-4639
  Fax: (804) 371-8654

- **Virginia Department of Education, Adult Education Training**
  (See INT - 5)

- **Virginia Literacy Foundation**
  700 E. Main Street
  Richmond, VA 23219
  Telephone: (804) 225-8777

- **Workforce Improvement Network**
  One Buckingham Place
  James Madison University
  Harrisonburg, VA 22807
  Telephone: (540) 568-2930
  Fax: (540) 568-2933
  Internet: www.jmu.edu.continued/win/win/html
  Email: foucardl@jmu.edu

INT - 4 (3 pages)

ADULT EDUCATION
REGIONAL SPECIALIST STAFFING

May 15, 1997

PD	JURISDICTIONS SERVED	SPECIALIST	AREA(S) OF EXPERTISE	PROGRAM PLANNER
1	Lee, Scott, Wise, City of Norton, Weber City, Jonesville	Jack D. Sizemore 148 Legion St. Weber City, VA 24290 540-386-2433 (W) 540-523-1402 (H) 800-422-3433 [F]540386-2242 email:jsizemor@vdoe386.vak12ed.edu	Working with Administrators Lead Teacher	**Rebecca Scott** **email: rhscott@vdoe386.vak12ed.edu**
2	Buchanan, Dickenson, Russell, Tazewell	Maxine Mullins Buchanan Co. Sch. P.O. Box 833 Grundy, VA 24614 540-935-6335 (W) 540-259-7431 (H) [F]540-935-7150	In 703 area code an 800 number is available 800-887-6335	
3	Bland, Carroll, Grayson, Smyth, Washington, Wythe, Cities of Galax, Bristol	Baja B. Conrad 625 W. Main Street Abingdon, VA 24210 540-628-1292 (W) 540-628-9413 (H) 800-322-7748 [F]540-628-8767	Recruitment Workplace Teacher Resource Lead Teacher Detail	**Deborah Lowe** **email: dslowe@vapen.** Marketing
4	Floyd, Giles, Montogomery, Pulaski, City of Radford	Marfesa Clark NRCC Drawer 1127 Dublin, VA 24084 540-674-3652 (W) 540-980-4003 (H) [F]540-674-3642 email:nrclarm@nr.cc.va.us	Program planning Organization Lead Teacher	
5	Allegheny, Botetourt, Craig, Roanoke, Cities of Roanoke, Salem, Covington, Clifton Forge	Lynn Winfree Roanoke Cy Sch Ad & Ct Ed The Jefferson Center 541 Luck Ave. Roanoke, VA 24016 540-853-1418 (W) 800-295-5525 email:lwinfree@vak12.ed.edu	Mathematics, learning styles, economics, & numeracy instruction	
6	Augusta, Bath, Highland, Rockbridge, Rockingham, Cities of Buena Vista, Harrisonburg, Lexington, Staunton, Waynesboro	Martha Carper Dayton Learning Ctr. P.O. Box 10 Dayton, VA 22821 800-336-6012 540-879-2730 (W) 540-234-8302 (H) [F]540-879-2033	Coordination among agencies Listening, encouraging & counseling Tutoring	**Ray Blouin** **417 Morningside Dr.** **Lexington, VA 24450** **540-463-7386 (W)** **540-463-7823 (F)** **Serving: Bath, Highland Rockbridge, Rockbridge, Buena Vista, & Lexington**
7	Clarke, Frederick, Page, Shenandoah, Warren, City of Winchester	Joan Kushnir D. J. Howard Voc. Center Northern Shenandoah Valley ABE 156 Dowell Circle Winchester, VA 22602 540-667-9744-800-435-5945 540-662-0656 (H) [F]540-662-2797	Portfolio assessment Staff develop/teach resource Individualization Task analysis in business from educational perspective Teaching AE class	**Phil Miller**
8				

BEST COPY AVAILABLE

9	Culpeper, Fauquier, Madison, Orange, Rappahannock	Patricia Brummett Carver Piedmont Tech Ctr 9432 James Madison Hwy. P.O. Box 999 Culpeper, VA 22701 540-825-0157(W) 800-371-7380 540-948-3238 (H) [F]540-825-6659	Literacy volunteers Coordination among agencies	
10	Albemarle, Fluvanna, Louisa, Nelson, City of Charlottesville, Greene	Susan Emo Albemarle Public Schools 401 McIntire Rd Charlottesville VA 22902 804-972-4073 (W) 804-977-6652 (H) [F]804-296-5883 email: semo@uva386.schools.virginia.edu	Teaching AE class Community education Provides current information on grant sources & private funding	
11	Amherst, Appomattox, Bedford, Campbell, Cities of Bedford, Lynchburg	Vacant		
1 2	Franklin, Henry, Patrick, Pittsylvania, Cities of Danville, Martinsville	Diane Onwuchekwa Danville City Schools 22 Baltimore Ave Danville VA 24541 804-799-6471(W) 804-791-2582 (H) 800-804-6357 F 804-799-5000 Email: onwuched@athena.ncat.edu	Workplace	**Stacey Wright** **Danville City Schools** **22 Baltimore Ave** **Danville VA 24541** **804/799-6471** **800/804-6357** **F 804/799-5000**
13	Mecklenburg, Brunswick, Halifax	Sheila Harper SS VA Comm. College Rt. 1 Box 15 Keysville, VA 23947. 804-736-2085 (W) 804-676-2291 (H)	Write grants Collaboration Welfare reform	
14	Amelia, Buckingham, Charlotte, Cumberland, Lunenburg, Nottoway, Prince Edward	Robert Vogt Southside Virginia Community College Route 1, Box 15 Keysville, VA 23947 804-736-2085 (W) 804-223-8753 (H) [F]804-736-2082	Recruitment Workplace Ed Welfare Reform Grant Writing	
15				
16	Caroline, King George, Spotsylvania, Stafford, and the City of Fredericksburg		Administrative Problem solving Workplace Lead Teacher program	**Joyce Hamilton** **Spotsylvania Voc/Tech Center** **6703 Smith Station Rd** **Spotsylvania VA 22553** **540-898-8165** **800/433-1520** **[F]540-891-2726** **email:** **jhamilto@mwc.vak12ed.edu**
17	Lancaster, Northumberland, Richmond, Westmoreland, Town of Colonial Beach	Joe Spivey Successful Learning P.O. Box 911 White Stone, VA 22578 804-435-1853 Judith Davis - Pres.	Program organization lines of authority job decription Lead teacher program Recruitment volunteer instructors-staff development	Joe Spivey

18	**Essex, Gloucester, King William, King & Queen, Mathews, Middlesex, Town of West Point**	**Danielle Robinson Middlesex Co. Sch. PO Box 206 Saluda, VA 23149 804-758-3928**	**Family Literacy Workplace Literacy Community-Collaboration**	
19	Dinwiddie, Greensville, Prince George, Surry, Sussex, Cities of Colonial Heights, Emporia, Hopewell, Petersburg	Kathy Anderson Southside Programs for Adult and Continuing Education 6610 Commons Drive, Suite 101 Prince George, VA 23875 804-733-2670 (W) 800-321-6081 [F]804-733-2673	Mentoring, assessment, grant writing, & fellowship writing	Dale Temple
20	Isle of Wight, Southhampton, Cities of Franklin, Suffolk	Catherine Boccard Center for Lifelong Learning The Western Tidewater Adult Ed. Program 4169 Pruden Blvd Suffolk, VA 23434 757-539-7407 (W) 757-877-8288 (H) [F]804-539-0733 email: cboccard@pen.k12.va.us	Teaching AE class Participortary learning Coalition building Portfolios	
21				
22	Accomack, Northampton	Maureen Dooley E.S.C.C. 29300 Lankford Hwy. Melfa, VA 23410 757-787-5941 (W) 757-782-5941 (H) [F]804-787-5919 email:mdooley@leo.vsla.edu.	Family Literacy Teaching AE class	

ADULT EDUCATION AND TRAINING
TELEPHONE NUMBERS (804)
P. O. BOX 2120
RICHMOND, VA 23218-2120

	PHONE	FAX
LENNOX L. MCLENDON, ED.D., lmclendo@pen.k12.va.us ASSOCIATE DIRECTOR (PROGRAM MANAGER) •	225-2293	371-2456
ADULT EDUCATION SPECIALISTS		
ELIZABETH HAWA, ehawa@pen.k12.va.us SPECIALIST (PROGRAM PLANNING, PERFORMANCE INDICATORS, WORKPLACE EDUCATION)	225-2836	
REBECCA J. MOAK, PH.D. , rmoak@pen.k12.va.us SPECIALIST (DATA)	371-2924	
ERNESTINE H. SCOTT, ED.D., ehscott@pen.k12.va.us SPECIALIST (WELFARE REFORM, FAMILY LITERACY, PERFORMANCE INDICATORS)	371-7852	
ELLEN SHEPHERD, eshepher@pen.k12.va.us GRANTS MANAGER	225-2850	
PATRICIA S. TA'ANI, PH.D., ptaani@pen.k12.va.us SPECIALIST (GED CHIEF EXAMINER, ADULT SECONDARY EDUCATION)	371-2333	
SUPPORT STAFF		
ELISE LEONE, OFFICE SERVICES SPECIALIST, eleone@pen.k12.va.us	225-2075	
HELEN D. SHOOK (PROGRAM SUPPORT TECHNICIAN - GRANTS ADMINISTRATION)	371-2768	
MICHELLE PHILLIPS (PROGRAM SUPPORT TECHNICIAN) ASSISTANT GED CHIEF EXAMINER	786-4642	
GED HOTLINE	371-2334	

COUNCIL FOR ADULT EDUCATION AND LITERACY
P.O. 2120, 21ST FLOOR
RICHMOND, VA 23219

ROSALLEN MCMATH, (EXECUTIVE DIRECTOR), rmcmath@pen.k12.va.us	225-4639	371-2456

THE MISSING LINK

Selected Excepts Published in the BCEL Newsletter, July 1992

- *The Missing Link* was a two-year study conducted by the Southport Institute for Policy Analysis (SIPA)
- Small businesses represent 99% of all US businesses; employ 57% of the workforce; and generate two out of every three new jobs.
- The study consisted of four surveys: (1) a national mail and telephone survey of a random sampling of 11,000 small and medium-sized firms; (2) a more targeted mail survey of 4,317 members of the National Association of Manufacturers; (3) a separate telephone survey of 775 small firms; and (4) a survey of 1,535 members of the American Association of Community and Junior Colleges (AACJC) to learn about the "supply side" of employer-sponsored basic skills instruction.

Findings

- At present, 3-5% of small firms have workplace education programs in operation (15,000 to 25,000 program serve some 2000,000 to 300,000 people)
- The number of new and small business program starts has increased dramatically in the last three years.
- Manufacturers are also in the lead in initiating some form of work reorganization during the past three years.
- Medium-sized firms are much more likely to have workplace education programs than very small businesses.
- The vast majority of programs are taught at the worksite (participation is likely to be voluntary, with partial released-time given to workers).
- Contrary to expectation, the issue of released-time is not a major barrier to the establishment of workplace education programs.
- Worries about higher employee turnover as a result of improved education is not the major disincentive to providing workplace literacy programs that has commonly been thought. In fact, small businesses with education programs report *lower* turnover rates than those without programs.

only on their ability to improve productivity and prices, but also on their ability to deliver quality, variety, convenience, and customization in time to take advantage of market trends.

Workers need a wide array of skills, especially during production and marketing of goods, to meet new competitive standards. Production increases due to automation and reduced personnel costs do not mean success in a global economy. By the mid-1980s, employers realized that employees capable of meeting international competition needed job competencies that hinged on adequate education. If the economy could not meet these demands, others would. Industries began to extend investment in employee education to front-line workers in production and service delivery systems. Still, America was falling behind.[5]

By 1988, businesses, industries, unions, educators and individuals were bringing the issue of American global competitiveness and workers' needs for basic skills enhancement to the attention of federal policymakers. If workers increased basic skills, proponents argued, workers' effectiveness on the job would increase. America's ability to compete globally would be enhanced. But federal leadership was required.

The firs major federal legislation that addressed the issue of education skills [illegible] the workforce was the Omnibus Trade and Competitiveness Act of 1988 (which became P.L. 100-418). The legislation focused on trade issues, but also included provisions to create a national program of workplace literacy grants that would support the provision of job-related basic skills to workers.

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[5] Carnevale, A., *America and the New Economy*, 1991, p. 1.

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1 - 2 (2 pages)

WORKPLACE LITERACY: RESHAPING THE AMERICAN WORKFORCE

U.S. Department of Education
Office of Vocation and Adult Education
Division of Adult Education and Literacy
May 1992

The world of work is changing. An unprecedented interplay of technological, demographic and global economic forces is reshaping the nature of work in America and redefining the American workplace.

The primary force driving this transformation is advancing technology. Robotics enables fewer workers to do the work of many. These workers, however, must have higher level skills to operate and monitor all aspects of the production process. Computers make it possible to have an efficient office with fewer support staff. A single worker can handle all levels of operations, from data entry and document production to complex customer service transactions. That worker must be able to use technology, analyze information and handle human relations issues. Industries made lean and efficient by global competition closely track orders and coordinate resources for "just in time" production to maximize productivity and customization. Workers must make complex decisions about supplies and the production process.

At the same time, a structural shift in the economy of the United States is occurring, away from producing goods and toward service=based industries. The number of jobs will increase 25 million by the year 2000, mostly in management, administrative support, sales and service.[1] These new jobs will require higher levels of education than current jobs. A growing number of workers will be required to meet educational standards formerly expected only of managers and other high-level workers. Basic skills levels that formerly were adequate for assembly line production are inadequate for employees faced with sophisticated quality control systems, flexible production, teach-based work and participatory management practices.[2]

On a collision course with these trends are changes in the pool of future workers. Workers are becoming a scarce resource, especially workers with adequate basic skills. The traditional pool of qualified 16 to 24-year-old workers entering the workforce is shrinking. Employers are reaching out to less qualified workers to develop entry-level workforces.[3]

One of every five American workers reads at or below the eighth grade level and one of every eight reads at the fourth grade level. Much of the reading required in a cross-section of jobs ranks between the eighth and twelfth grade levels. Fifteen percent of job-related material requires even higher reading levels. As industry taps workers who are less likely to have adequate basic skills, the skills gap is expected to widen.[4]

Americans pride themselves on competitiveness. But the literacy tools American workers are using to compete are obsolete. Economic success was once determined by a nation's ability to produce higher volumes of goods and services with the same or even fewer resources--at competitive prices. Today, industries and nations compete not

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[1] Hudson Institute, *Workforce 2000: Work and Workers for the 21st Century,* 1987, pp.58-59.

[2] *Ibid.*, pp.58-59.

[3] *Ibid*, pp. 76-81.

[4] Mikulecky, L., "Basic Skills Impediments to Communication Between Management and Hourly Employees," *Management Communication Quarterly,* Vol. 3, No.4, May 1990, pp. 452-473.

1 - 3 (2 pages)

NATIONAL ADULT LITERACY SURVEY (NALS)

Report Summary

In 1992 ETS (Education Testing Service) conducted the survey for DOE (US Department of Education). There are approximately 191 million adults in the USA nationally representative sample of more than 26,000 people age 16+across the country devoted at least one hour to the survey which included applied literacy tasks plus background questions about education, employment history, demographics etc.

Authors of the study were attempting to show that literacy is not a condition you either have or you don't have. It's more complex.

RESULTS:

- 23% (translating to 44 million adults) performed at Level I. Many Level I people had not completed HS, were over 65 years of age, had limiting physical or mental conditions or were immigrants.
- 25-28% (50 million) performed at Level II. Repertoire is still quite limited.
- Nearly 1/3 (or 61 million) were Level IIIs.
- 18-21% (34-40 million) performed in the two highest levels.

Many respondents in Levels 1 and 2 did not perceive their skills as faulty. A majority of those in Level 1 and nearly all in Level 2 said they could read or write English "well" or "very well."

More than half of HS grads were found to have restricted abilities in math & reading.

Those with limited skills are far more likely to be unemployed and to live in poverty. Those with higher levels of literacy are more likely to be employed, work more weeks in a year, and earn higher wages.

"Literacy can be thought of as currency in this society," the authors write. "Just as adults with little money have difficulty meeting their basic needs, those with limited literacy skills are likely to find it more challenging to pursue their goals."

Median weekly salary. Level 1: $230 to 245. Level 5: $620 - 680.

There is no consensus on the meaning of the results. Some argue that the workplace is becoming more complex. Others say it is being "dummied down." Many think that the ability to integrate information, generate ideas and apply arithmetic operations sequentially to solve a problem is a growing necessity.

The continuing process of demographic, social, and economic change within this country could lead to a more divided society along both racial and socioeconomic lines.

NALS assessed adults of three types of literacy:

- Prose, the ability to understand and use information from texts such as news articles, poems & stories
- document literacy, the ability to locate and use information in documents such as application forms, maps, and tables
- quantitative literacy, the ability to apply arithmetic operations to numbers embedded in printed materials, such as a checkbook, order form, or ad

The survey broke literacy into 5 levels.

- Level 1: can identify a country named in a short article, locate the expiration date on a driver's license, total a bank deposit entry.
- Level 2: can interpret instructions from an appliance warranty, identify and enter background info on an application for a social security card, and calculate postage and fees for certified mail.
- Level 3: can write a brief letter explaining an error made on a credit card bill, identify information from a bar graph dealing with energy sources, and calculate miles per gallon using information given on a mileage record chart.
- Level 4: can explain the difference between two types of employee benefits, sue a table of information to determine a pattern in oil exports across years, and use an eligibility pamphlet to calculate the yearly account a couple would receive for basic supplemental security income.
- Level 5: can compare approaches stated in a narrative on growing up, use a table to compare two credit cards and write about two differences between them, and use a calculated to determine the total cost of carpeting a room.

These comments from *America's Choice: high skills or low wages!* add to the concerns raised by the NALS report.

- Over the past 15 years, the gap in earnings between professionals and clerical workers have grown from 47 to 86% while the gap between white collar workers and skilled tradespeople has risen from 2 to 37%. At the same time, earnings for college education males 23 to 34 have increased by 10% while earnings for those with HS diplomas has declined by 9%. Poverty rate for Black families is nearly three times that for White families. One child in five is born into poverty.

EDUCATIONAL CHARACTERISTICS
of persons over 25
in the New River Valley

1990 Census

	FLOYD	GILES	MONT.	PULASKI	R'FORD	TOTAL
% < 9 grade	25%	18%	13%	20%	12%	17%
% 9-12 No Diploma	14%	18%	13%	20%	13%	16%
# Not HS Graduates	3,277	3,977	10,005	9,407	1,552	28,218
% Not HS Graduate	40%	36%	26%	40%	25%	32%

CHARACTERISTICS OF TODAY'S AND TOMORROW'S WORKPLACE[1]

TRADITIONAL MODEL	HIGH PERFORMANCE MODEL
STRATEGY	
mass production	flexible production
long production runs	customized production
centralized control	decentralized control
PRODUCTION	
fixed automation	flexible automation
end-of-line quality control	on-line quality control
fragmentation of tasks	work teams, multi-skilled workers
authority vested in supervisor	authority delegated to worker
HIRING AND HUMAN RESOURCES	
labor-management confrontation	labor-management cooperation
minimal qualifications accepted	screening for basic skills abilities
workers as a cost	workforce as an investment
JOB LADDERS	
internal labor market	limited internal labor market
advancement by seniority	advancement by certified skills
TRAINING	
minimal for production workers	training sessions for everyone
specialized for craft workers	broader skills sought

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[1] Source: "Competing in the New International Economy." Washington: Office of Technology Assessment, 1990.

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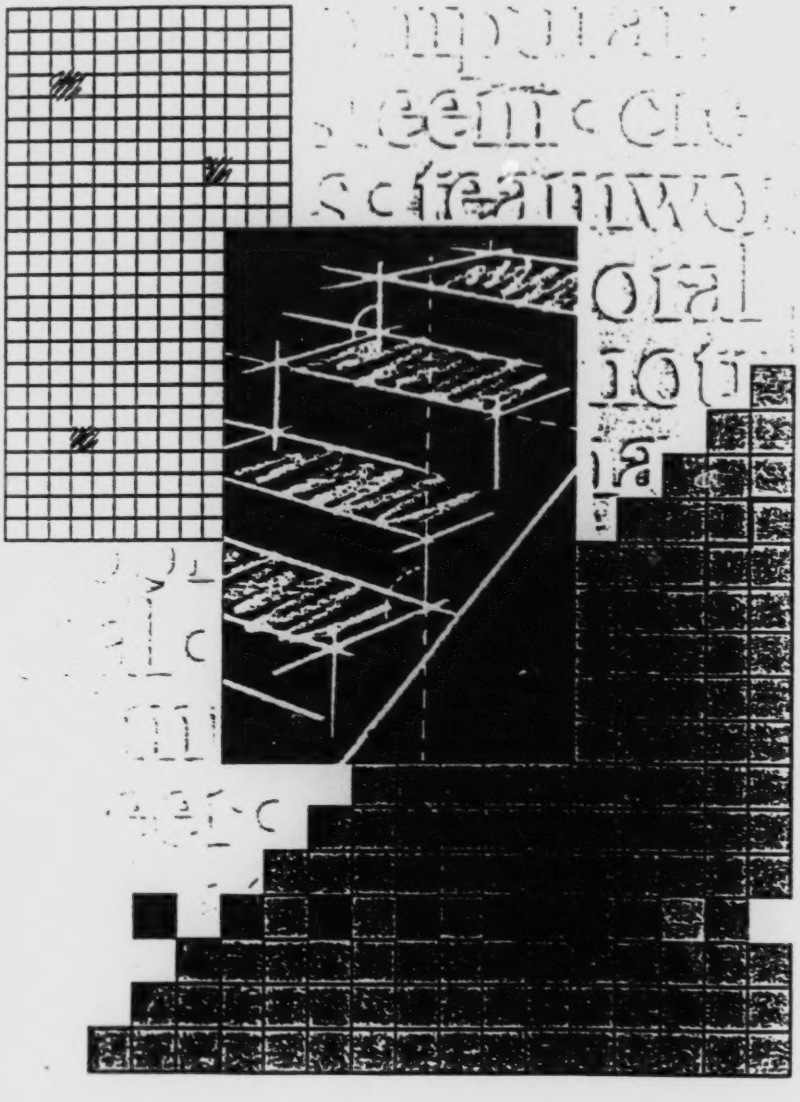
Workplace Basics:

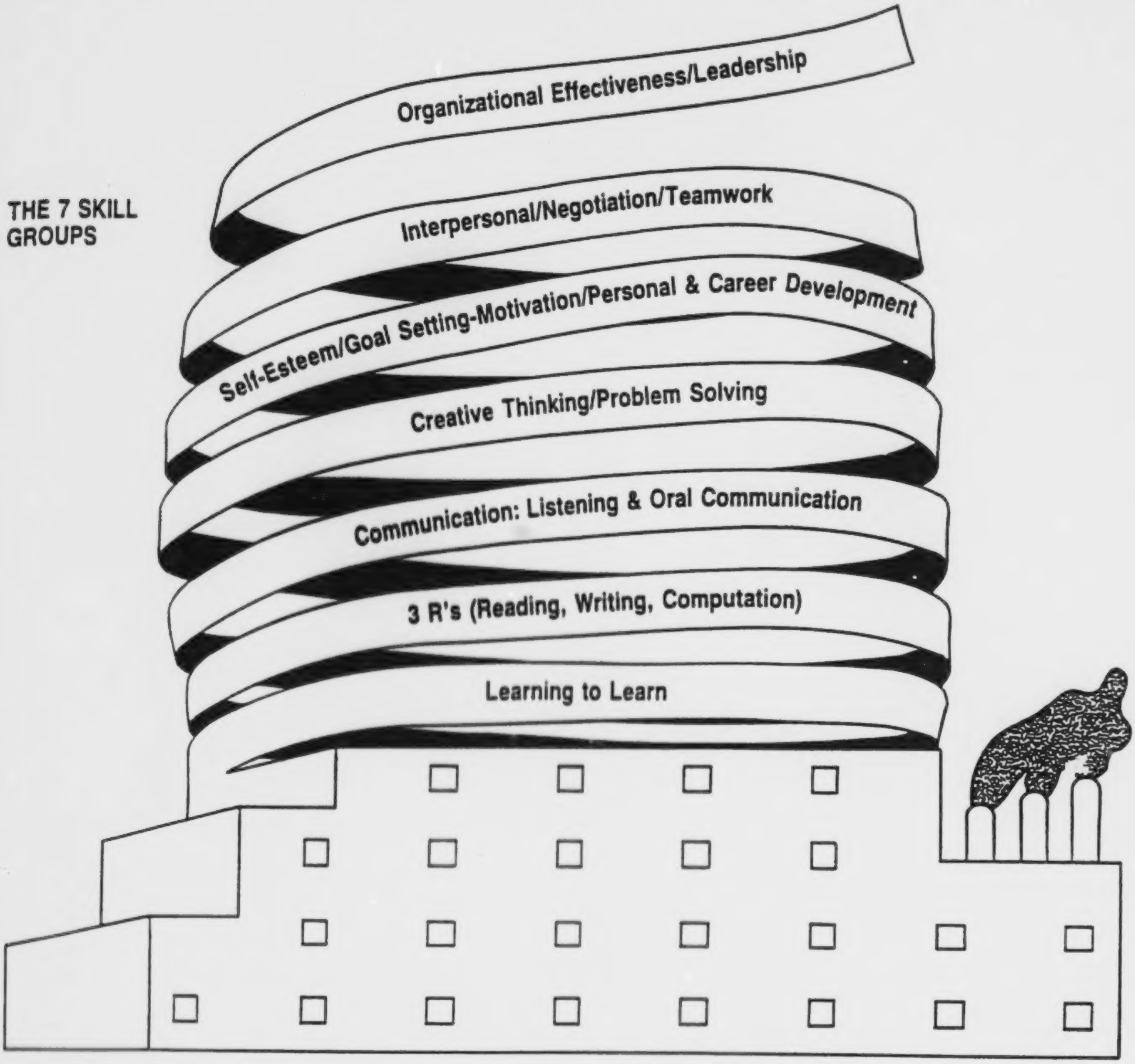
THE SKILLS EMPLOYERS WANT



The American Society for
Training & Development

U.S. Department of Labor
Employment & Training Administration

THE 7 SKILL GROUPS


Organizational Effectiveness/Leadership
Interpersonal/Negotiation/Teamwork
Self-Esteem/Goal Setting-Motivation/Personal & Career Development
Creative Thinking/Problem Solving
Communication: Listening & Oral Communication
3 R's (Reading, Writing, Computation)
Learning to Learn

AMERICAN SOCIETY FOR
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WHAT WORK REQUIRES OF SCHOOLS

★ ★ ★ ★ ★

A SCANS REPORT FOR AMERICA 2000

REPRODUCED BY
U.S. DEPARTMENT OF COMMERCE
NATIONAL TECHNICAL
INFORMATION SERVICE
SPRINGFIELD, VA 22161

THE SECRETARY'S COMMISSION ON ACHIEVING NECESSARY SKILLS
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Workplace Know-How

The know-how identified by SCANS is made up of five competencies and a three-part foundation of skills and personal qualities that are needed for solid job performance:

FIVE COMPETENCIES

Resources: Identifies, organizes, plans, and allocates resources

A. *Time* – Selects goal-relevant activities, ranks them, allocates time, and prepares and follows schedules
B. *Money* – Uses or prepares budgets, makes forecasts, keeps records, and makes adjustments to meet objectives
C. *Material and Facilities* – Acquires, stores, allocates, and uses materials or space efficiently
D. *Human Resources* – Assesses skills and distributes work accordingly, evaluates performance and provides feedback

Interpersonal: Works with others

A. *Participates as Member of a Team* – contributes to group effort
B. *Teaches Others New Skills*
C. *Serves Clients/Customers* – works to satisfy customers' expectations
D. *Exercises Leadership* – communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies
E. *Negotiates* – works toward agreements involving exchange of resources, resolves divergent interests
F. *Works with Diversity* – works well with men and women from diverse backgrounds

Information: Acquires and uses information

A. *Acquires and Evaluates Information*
B. *Organizes and Maintains Information*
C. *Interprets and Communicates Information*
D. *Uses Computers to Process Information*

Systems: Understands complex inter-relationships

A. *Understands Systems* – knows how social, organizational, and technological systems work and operates effectively with them
B. *Monitors and Corrects Performance* – distinguishes trends, predicts impacts on system operations, diagnoses deviations in systems' performance and corrects malfunctions
C. *Improves or Designs Systems* – suggests modifications to existing systems and develops new or alternative systems to improve performance

Technology: Works with a variety of technologies

A. *Selects Technology* – chooses procedures, tools or equipment including computers and related technologies
B. *Applies Technology to Task* – Understands overall intent and proper procedures for setup and operation of equipment
C. *Maintains and Troubleshoots Equipment* – Prevents, identifies, or solves problems with equipment, including computers and other technologies

A THREE-PART FOUNDATION

Basic Skills: Reads, writes, performs arithmetic and mathematical operations, listens and speaks

A. *Reading* – locates, understands, and interprets written information in prose and in documents such as manuals, graphs, and schedules
B. *Writing* – communicates thoughts, ideas, information, and messages in writing; and creates documents such as letters, directions, manuals, reports, graphs, and flow charts
C. *Arithmetic/Mathematics* – performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques
D. *Listening* – receives, attends to, interprets, and responds to verbal messages and other cues
E. *Speaking* – organizes ideas and communicates orally

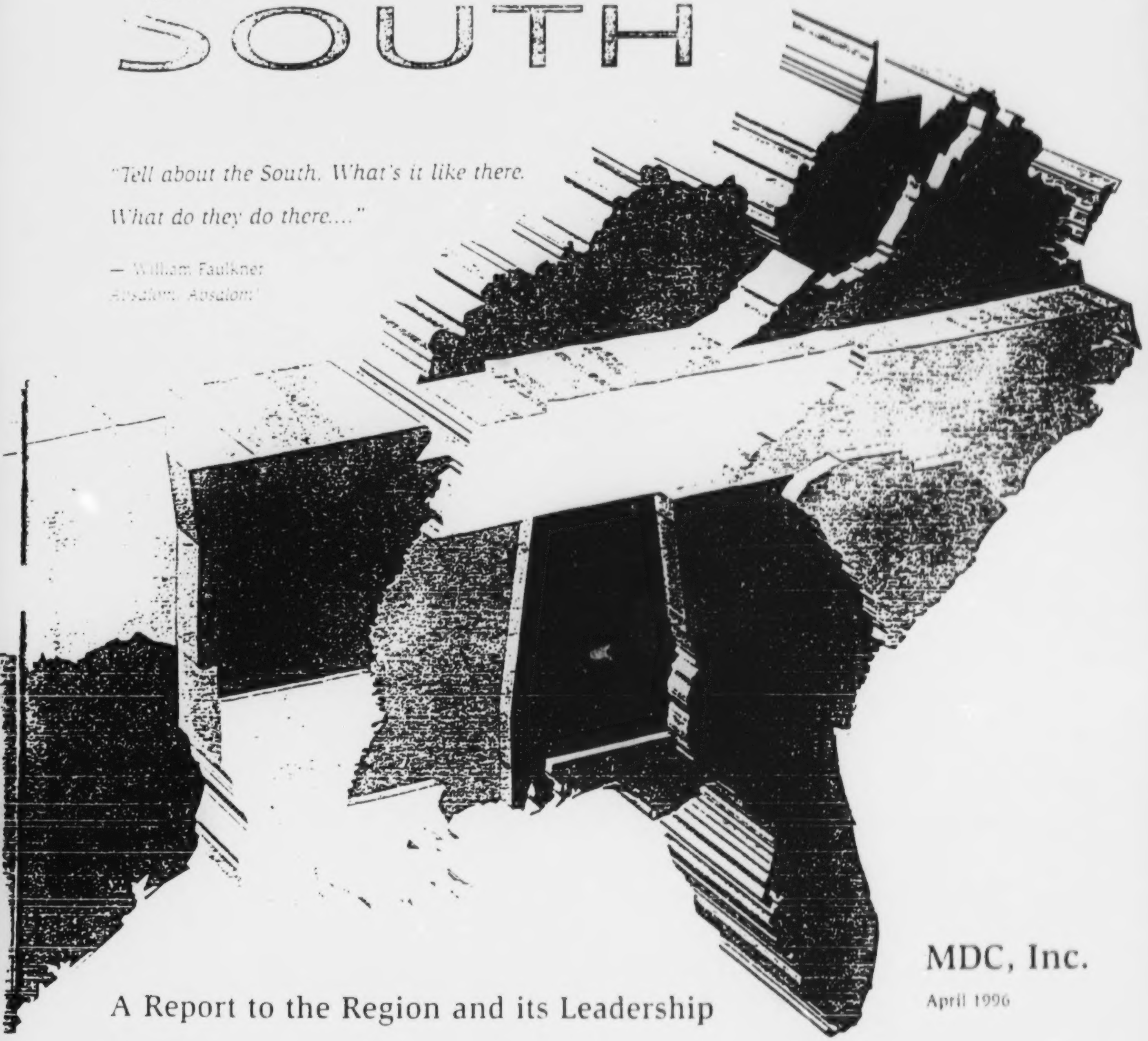
Thinking Skills: Thinks creatively, makes decisions, solves problems, visualizes, knows how to learn, and reasons

A. *Creative Thinking* – generates new ideas
B. *Decision Making* – specifies goals and constraints, generates alternatives, considers risks, and evaluates and chooses best alternative
C. *Problem Solving* – recognizes problems and devises and implements plan of action
D. *Seeing Things in the Mind's Eye* – organizes, and processes symbols, pictures, graphs, objects, and other information
E. *Knowing How to Learn* – uses efficient learning techniques to acquire and apply new knowledge and skills
F. *Reasoning* – discovers a rule or principle underlying the relationship between two or more objects and applies it when solving a problem

Personal Qualities: Displays responsibility, self-esteem, sociability, self-management, and integrity and honesty

A. *Responsibility* – exerts a high level of effort and perseveres towards goal attainment
B. *Self-Esteem* – believes in own self-worth and maintains a positive view of self
C. *Sociability* – demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings
D. *Self-Management* – assesses self accurately, sets personal goals, monitors progress, and exhibits self-control
E. *Integrity/Honesty* – chooses ethical courses of action

THE STATE OF THE SOUTH



"Tell about the South. What's it like there.
What do they do there...."

— William Faulkner
Absalom, Absalom!

A Report to the Region and its Leadership

MDC, Inc.
April 1996

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Glossary: Working Definitions of Some Words and Concepts Used in Workplace Education

Accessibility: The extent to which the program can be reached by employees who want or need it. Used as an important indicator of quality in some programs.

Adult Basic and Literacy Education: Refers to instructional programs which serve adults whose basic skills (reading, writing, and computation) are assessed below the 9th grade level. Adult Basic Education (ABE) is inclusive of literacy education and of ESL education. Adult Literacy Education, in general, refers to instructional programs which serve adults whose basic skills are 4th grade level and below.

Assessment: Process of collecting and analyzing information on participants, mostly on their learning and the transfer of it to the job. Often used interchangeably with "evaluation", which causes confusion. Currently, the majority of workplace education partnerships view assessment as an integral part of evaluation.

Attendance Rate: The class attendance rate represents the percentage of total student hours attended. This is calculated by dividing the total number of hours attended by the total number of possible hours.

Baseline Information: Information usually collected before a program is developed or implemented which provides a basis for planning and evaluation.

Basic Education for Workers: See Worker Education.

Basic Skills: Key skills needed to function in society and the workplace. Also **Life Skills**. See Workplace Basic Skills. Basic skills is a moving target; involves a commitment to lifelong learning.

Basic Skills for Workers: See Worker Education.

Benchmarking: A continuous, systematic process for evaluating the products, services, or work processes of organizations that are recognized as representing best practices of world-class organizations. Companies benchmark best practices for the purpose of improving their own organization.

Contextualized Curriculum: Curriculum that aims at facilitating the teaching and learning of skills, knowledge, and attitudes in the context(s) in which they occur.

Contextualized Instruction: Teaching of skills, knowledge, and attitudes in the contexts of society, the workplace, and/or the experiences of learners. Context specific materials are used.

Continuous Improvement (CI): High-performance management approach/practice which is customer - driven and process-based. Employs a scientific and team approach to decision making.

Cost-Benefit Analysis of A Program: Systematic process by which the (predominantly financial) benefits of a program are compared to the costs. Also **Return on Investment**.

Cost Savings: The amount of money saved through an action taken. Sometimes used to demonstrate effectiveness of programs. Often the result of a cost-benefit analysis.

Course Outline: Overview of the goals, objectives, content, methods, activities, materials, and timetable of a specific class, course, or instructional sequence. Can be organized using a wide range of criteria (e.g. topics, skills, tasks, situations, etc.). Also see Syllabus.

Critical Incident Analysis/Technique: Systematic way to analyze an event, action or behavior.

Curriculum: Term used to describe the philosophy or approach (i.e. assumptions), mission, goals, objectives, learning arrangements or design (e.g. group instruction), content and method(s) of instruction, assessment and evaluation of a program. Very often used interchangeably with course outline and syllabus, which causes confusion. Curriculum is much broader than syllabus. It involves a description of all aspects of the program.

Customized Instruction: Instruction tailored to the specific needs, goals, and interests of learners and/or partnerships, workplaces, organizations, and communities.

Deviation: Term used in statistical analysis to describe the amount by which information (e.g. a score) differs from some selected reference value (e.g. normal).

Distribution: Charting of numbers in tables extending from either high to low or low to high. Used to identify the number of items or people that fit into specific groups or categories.

Effort: Resources that have gone into program (e.g. time, people, dollars). Sometimes used as an indicator of program success.

Equipped for the Future (EFF): A key solution to the challenge of helping all adults become more effective workers, citizens, parents, and lifelong learners. It is a standards-based approach to reforming the field of adult literacy and improving linkages among the myriad of public and private sector programs that support adults.

Ethnographic Approach to Workplace Education: Approach to program and curriculum development for workplace education that draws on the research of the cultures of the workplace and the participants. Issues are identified and resolved collaboratively.

Evaluation: Process used to determine the value of a program by collecting and analyzing information about different aspects of it. Called **formative** when referring to ongoing data analysis and collection. Called **summative** when done at closure of program. In workplace education evaluation commonly includes assessment of learning, transfer of learning, organizational change, and program processes and outcomes.

Feedback: Process of soliciting, giving, and sharing information on an activity, event, or behavior involving all stakeholders.

Formative Evaluation: On-going evaluation which aims at improving a program as it is developing.

Functional Literacy: Basic skills needed to minimally function in society or at the workplace. There is no consensus in the field on what functional means. One group of practitioners believes it is possible to identify a specific set of skills. Another group says that different skills or "literacies" are needed for different purposes and in different contexts. Additional views exist.

Functional Context Approach to Workplace Education: Approach to program development, curriculum development, and instruction that draws on the belief that effective workplace education programs teach the application of basic skills needed to perform job tasks so that transfer of classroom learning to the job is promoted. Common models encourage the development of curricula and instruction from literacy audits that identify key skills. Once learners are assessed to see where they are "skill-deficient , the curriculum and instruction are developed to bridge the skills gap that was identified. Also see Literacy Audit.

Goal: Specific point marking destination, aspiration, or the objective of effort.

Goal 6 of the National Education Act (1991): "By the year 2000, every adult American will be literate and will possess the knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship."

High Performance: The successful and effective execution of responsibilities. SCANS defines **high performance work organizations** as those work settings relentlessly committed to excellence, product quality, and customer satisfaction. **High performance workers** possess these same qualities.

Indicator: Marker that shows how much progress has been made towards a goal or objective.
Individual(-ized) Education Plan:
Summary of needs and goals of learners including an action plan and timetable. Developed jointly by teachers and learners.

Institutionalization: The continuation of publicly-funded workplace education pilot or demonstration projects at the workplace with employer and/or union funds.

ISO 9000: Series of international standards for Quality Assurance Management Systems. Establishes the organizational structure and processes for assuring the production of goods and services that meet a consistent and agreed upon level of quality for a company's customers. A growing number of countries refuse to do business with companies that do not meet these standards.

Job Analysis: Analysis of jobs to identify major duties, responsibilities, tasks, equipment, and materials. Often performed to identify the need for a training program or in anticipation of necessary restructuring or reorganization.

Just-In-Time (JIT): A production and inventory control system that was designed to cut waste and reduce cost. For example, products are delivered JIT to a customer rather than being manufactured early and stored as inventory.

Literacy Audit: Analysis of current or future processes, jobs and tasks to identify those basic skills required for successful job performance.

Literacy Job Analysis: Analysis of job duties, responsibilities, tasks, equipment, and materials to determine literacy requirements. Also see Literacy Audit.

Literacy Task Analysis: Part of literacy job analysis. Breaks down tasks in different steps and identifies materials and equipment needed. Identifies which literacy skills are needed at each step.

Longitudinal Study: Study which looks systematically at aspects of a program or data (e.g. on participants) over a long period of time.

Organizational Approach to Workplace Education: Approach that draws on the belief that more is needed than workplace education programs in order for workers and organizations to achieve their goals. It examines basic skills within the context of the workplace cutlure and workplace issues. Its multi-pronged strategy might include: fostering a learning culture, offering plain language workshops, rewriting work documents in clear language, in addition to offering workplace education services.

Organizational Performance: Information that shows how an organizations (e.g. business) is performing in meeting its goals.

Outcome: Result. Can be both anticipated and unanticipated, goal-based or not, positive or negative.

Participatory Approach to Workplace Education: Approach which employs a process where the active participation of learners is sought in program-related decision making in the areas of planning;

implementation (including areas such as instruction, curriculum development, assessment); management; evaluation and monitoring. Level of participation may vary depending on program philosophy.

Pay For Skills: Incentive program for employees where the acquisition of specific skills is rewarded financially.

Planning and Evaluation Team (PET) in Workplace Education Programs: Team consisting of employer, supervisor(s), teacher(s), learner(s), and labor representative(s) (if applicable). Responsible for planning, implementation, evaluation, and improvement of a program. In some programs, now refered to as: **Employee Involvement Teams**.

Quality: The totality of features and characteristics of a product or service that bear on its ability to meet or exceed customer expectations while maintaining a cost competitive market position.

Qualitative Data/Information: Types of information on the quality of something (e.g. program). Sometimes called anecdotal or soft data.

Quantifiable Data/Information: Items of information that can be represented or converted into numbers. Sometimes referred to as hard data. (qualitative data can be quantified)

Quantitative Data/Information: Measurable types of information on the quantity of something. Expressed in numbers (e.g. scores).

Random Sample: Way to select individuals, items, or data so that all have an equal chance of being selected. Often used in evaluation to ensure equity and reliability.

Regional Adult Education Specialists: Part time adult educators who provide training and other related support services to local school districts and community colleges in the area of adult basic and literacy education. Specialists respond primarily to the needs of adult education instructors and assist them in orientation, baseline training, and inquiry-based professional development. The specialists also market and assist in the are of workplace education programming.

Regional Literacy Coordinating Committees: (RLCC) Created in 1988 by the Virginia Literacy Initiative to provide a mechanism for coordinating literacy education at the regional level. The membership consists of representatives from public and private stakeholders in adult basic and literacy education. The primary functions of these committees are to create lines of communication among stakeholders, create community and regional awareness regarding the issue of literacy, and to serve as liaisons between the local and state levels in terms of identifying needs and accessing these services.

Release Time: Incentive for employees to promote participation in education and or training programs where classes or training sessions can be attended during work time, often with pay (i.e. paid release time).

Reliability: Extent to which something (e.g. assessment tool) is of consistent quality and can be relied on when used several times.

Retention Rate: Used for classes and work. Tells how many participants the program has been able to successfully enroll and retain. High rates are often considered to be an indicator of program success and quality. Work retention is the percentage of hired employees that were retained over a period of time. Often reported on quarterly and annual basis. Important indicator of program success for some programs.

Return on Investment (ROI) for Workplace Education Program: Benefits (very often financially) of program. High return on investment is important for some business/labor partners in view of program institutionalization.

Scientific Approach: Use of data collection to inform team-based decision making in TQM/CI work organization.

The Secretary's Commission on Achieving Necessary Skills (SCANS): The commission convened in 1990 to examine the demands of the workplace and determine whether the current and future workforce is capable of meeting those demands. They identified five competencies (skills necessary for workplace success) and three foundations (skills and qualities that underlie competencies):

Foundations: Basic Skills, Thinking Skills, Personal Qualities
Competencies: Resources, Interpersonal Skills, Information, Systems, Technology

Statistical Process Control: System to chart and analyze the production and service delivery process at several points along the way.

Summative Evaluation: Type of evaluation that sums up and summarizes the overall achievements of a program.

Syllabus: Way to organize objectives, content, methods, activities, materials, and timetable of a specific class or course. Several criteria can be used to organize the syllabus. Common are: tasks, notions, skills, situations, topics, issues, etc. Also See Course Outline.

Team-Based Management: Management practice where decision making about production and service delivery processes are made by teams that base their decisions on data they collected and analyzed collaboratively.

Total Quality Management (TQM): High-performance management approach/practice which is customer-driven and process-based. Employs a scientific and team approach to decision making. Often used interchangeably with Continuous Improvement.

Training (Program): Services that provide instruction in technical or job skills prior to and during employment.

Turnover Rate: Percentage of all hired employees that left their jobs over a period of time. Often calculated on a quarterly or annual basis. Decreased turnover rates are indicators of program success for some programs.

Utilization Rate of Program: Often used as an indicator of program quality. Rate indicates how many people are using the services of a program versus the total number of people who could benefit from the program.

Validity: Extent to which something (e.g. assessment tool) is relevant, pertinent, significant to the situation/people it is used in/applied to.

Value-Added Idea/Outcome: Suggestion or idea that has led to substantial savings or improvements in production or service delivery processes. For some programs, value-added ideas or employee suggestions are viewed as an important outcome.

Waste (Rate): Scrap rate. Rejection rate. Tells the number or percentage of goods or services that did not meet minimum quality standards.

Work(er) Attendance/Absenteeism: Worker attendance rates show the percentage of days attended. Absenteeism rates show the percentage of days missed. Used by some programs as an indicator of program success.

Worker Education: Adult basic education opportunities for workers. Curriculum goals are not necessarily derived from workplace needs assessments. Opportunities of this type take place in any context - the workplace, the union hall, the community, etc. These services are often found in union settings. Worker Education Programs use a holistic view of education. This view promotes the development of a wide range of skills, attitudes, and knowledge bases to achieve personal, as well as work-related goals.

Worker Literacy: see Worker Education.

Workforce Development: umbrella term that refers to all education and training initiatives that promote the enhancement of the skill levels of the current and future workforce.

Workforce Improvement Network (WIN): WIN's mission is to facilitate the professional development of workforce education providers and to create new workforce education programs throughout the Commonwealth of Virginia. WIN provides training; support, and technical assistance to workplace education providers in Virginia, in the areas of marketing, contracting and funding; program design; curriculum and materials development; needs assessment; assessment of student progress; program evaluation. In addition, offers certification of workforce education brokers.

Workforce Literacy: Literacy instruction that is not necessarily tied to a particular workplace. Workforce literacy also includes opportunities for displaced workers to upgrade their skills to prepare for retraining or new employment.

Workplace Education: Umbrella term used to describe the field of education opportunities -- not training -- that promote the development of work-related basic skills/literacy skills. Curriculum is workplace-specific. Instruction is mostly offered at the work site.

Workplace ESL/ESOL: Instruction in English at the workplace to speakers of other languages, very often with a work-specific focus.

Workplace Basic Skills: Umbrella term used to refer to the key skills needed at or in preparation for entry into a particular workplace or the workforce. Several working definitions are used that sometimes contradict each other. Some are narrow and include only reading, writing, math, oral communication, and problem-solving. Others are broader and may include any of the following: oral communication, reading, writing, computation, math, problem-solving, analytical thinking, the ability to maintain self-esteem and self-manage, interpersonal and intercultural skills, the ability to self-direct learning and the ability to adapt to change, etc. The term "workplace basic skills" and "workplace literacy skills" are often used interchangeably.

Workplace Basic Skills Analysis: Process used to determine which basic skills are needed or will be needed to perform certain jobs, tasks, and workers. Formal methods include literacy audits and literacy job/task analyses.

Workplace Literacy Initiative: All initiatives used at a particular workplace to address the basic skills issues including educational opportunities and any additional organizational strategies.

Workplace Literacy Skills: See Workplace Basic Skills.

Workplace Literacy: Refers to instructional programs which provide basic educational services to employees of individual businesses (or consortia). These programs are usually housed within the work site. Literacy and basic skills are moving targets and involve a commitment to lifelong learning.

Workforce Improvement Network, February, 1997

Acronyms

ABE: Adult Basic Education. Often used as an umbrella term for all basic skills for adults, including ABE (referring to up to 8th grade level) EDP, ADP, ESL, literacy, GED
ADP: Adult Diploma Program.
ASTD: American Society for Training and Development. Professional organization for human resource staff and trainers.
CAL: Computer-assisted learning.
CAI: Computer-assisted instruction.
CPD: Centers for Professional Development.
DOE: Department of Education.
DET: Department of Employment and Training.
DSS: Department of Social Services.
EFF: Equipped for the Future. An initiative of the National Institute for Literacy.
EDP: External Diploma Program.
ESOL: English to Speakers of Other Languages.
ESL: English as a Second Language.
GED: General Education Development.
IEP: Individual Education Plan. (also Individual Goal Plan)
JTPA 8%: Job Training Partnership Act. Provides funding for higher-level occupational skills training, youth services, adult basic education/literacy, and workplace education.
RLCC: Regional Literacy Coordinating Committee (pronounced "relic")
VEC: Virginia Employment Commission.
VIEW: Virginia Initiative to End Welfare.
WIN: Workforce Improvement Network.

2 - 2 (3 pages)

WORKPLACE JARGON AND ORGANIZATION OF WORK
PRESENTED AT THE VIRGINIA ADULT EDUCATION MEETING, LYNCHBURG VA
OCTOBER 27-29, 1993

PART I: WORKPLACE JARGON

I'd like to spend a little time describing typical conversations I have as I market workplace literacy programs.

The HRD is the person with whom I generally make my initial contact. More often than not, there's been a recent corporate LBO. If not, top management is worried that one is imminent. Re-engineering is the name of the game.

Typically companies which are interested in exploring basic skills options are also going through a paradigm shift from a Taylor organization to TQM. Many are exploring the use of SDWTs.

If so, they're often struggling with how to introduce SPC to front line workers. Many companies are exploring cost saving measures and are revising inventory processes to comply with a JIT model. Still others are looking for new markets and are applying for ISO 9000 certification.

Have I lost anyone? How comfortable would you or one of your teachers be in a conversation in which HRD, LBO, JIT, TQM, SDWT, SPC and ISO are part of the vocabulary?

A translation of these terms:
HRM = Human Resource Manager
LBO = Leveraged Buy-Out
Re-engineering = Downsizing
Taylor & TQM = ...see following pages
SDWT = Self-directed work team
SPC = Statistical Process Control
JIT = Just in Time inventory model
ISO 9000 = the certification process for companies doing business in Europe.

On the other hand, how comfortable do you think a business person would be if I said this?

As the EDD I help employers understand the benefits of a workforce well grounded in basic skills. I discuss lifelong learning program options such as ABE and GED classes, life skills, or courses tailored specifically for the company from their manuals and written materials. I talk about options for Level I learners and describe LVA, our local volunteer literacy provider. I talk about assessment options like TABE and CASAS.

Are terms like EDD, ABE, GED, LVA, TABE and CASAS more familiar? [As a side note, I often use the term "workplace literacy" to get in the door to talk with employers because that is the current language being used in journals they are likely to read. After the initial introduction, however, the term "literacy" is never used again.]

I've used these examples because the words in both parts of what I just said are written and pronounced in English, but in many ways they are from completely different languages. It's safe to say that, on the whole, business people do not converse in the same language used by educators. The language of business is money and their reason for being is profit. This tends to be an alien concept to educators and one with which we are not particularly comfortable. Profit is, however, the bottom line and a fact of life for business.

In order to successfully sell workplace basic skills programs and produce a product which meets employers' needs, it's vital to be conversant in THEIR language. They are our customers and its our job to meet their needs.

Workplace educators must be willing to learn this new language. Fortunately, it's relatively easy to do. But it does take time.

Great places to learn the language include the business section of the newspaper, industry journals, training and human resource management magazines. Economic development offices are an invaluable source of knowledge and information. Attend some quality seminars. Read books about the guru's whose names are listed on the handout I'll pass out in a moment.

PART II: ORGANIZATION OF WORK

Almost without exception, companies which sponsor workplace basic skills programs are also going through a "quality" transformation. Therefore, learning about management and quality systems is a must.

One element which made this country a world economic power was our efficient system of mass production. Early in the 1900s Henry Ford was determined to mass produce automobiles. He had at his disposal an illiterate non-English speaking immigrant workforce. Ford turned to Frederick Taylor to design an organizational structure which would make his goal a reality. The result was "scientific management" or "the Taylor model" of organization.

Taylor devised a system whereby work would be managed by a small group of planners and supervisors who would do all the thinking for the organization. Actual hands-on work was broken into the smallest possible pieces so that employees could work independently of what went on before or after them. "

Thus the workforce was divided into "thinkers" and "doers." The thinkers were generally college educated. The primary prerequisites for "doers" were strong backs, high tolerance for boredom, and a willingness to "check their brains at the door."

Taylor's system was a huge success. Mass production flourished and for several decades the U.S. was the preeminent world manufacturing power. Taylor's system also made it's way into the service industry. Today, almost all organizations from restaurants to factories are organized on Taylor's pyramid model with a few persons at the top of the organization doing the thinking for the entire organization.

Into this Taylor-dominated world (where quantity, not quality, was the major industrial goal) stepped W. Edwards Deming. In 1928, the 28 year old Deming became acquainted with Dr. William Shewhart of Bell Telephone Laboratories. Through this relationship Deming became familiar with the concept of Statistical Process Control (SPC) and began the development of his philosophy on continuous improvement. (Information on Deming borrowed heavily from *The Transformation of American Industry*, Deming on Quality and Productivity, 1986.)

Shortly after the start of World War II, the President of Stanford University sent letters to a number of people asking for suggestions about Stanford's potential contribution to the war effort. One of the letters came to Deming's attention. He suggested that Stanford teach the simple but powerful techniques of statistics to engineers and others. He felt that this would bring better precision and higher productivity to the nation's plants. Starting in 1942, Deming and others taught SPC to more than 10,000 individuals in 800 organizations.

Deming's methods are not a quick fix for quality/productivity problems, nor are they simply learning about statistical methods. They represent a way of thinking about how to manage business operations to accomplish continuing improvement in processes and continuing improvement in people. His *Fourteen Obligations of Management* ("Fourteen Points") encompass guidelines for change in all areas of an organization.

Deming's approach to process control had little positive effect on most American organizations largely because it did little to educate and involve top management in the implementation of these techniques. Instead it focused on the engineering and quality control functions. Quality, as Deming emphasized, cannot be improved unless top managers understand and "adopt constancy of purpose." By 1950, due to lack of interest by management (who mistakenly felt that the US was preeminent and therefore had no need to adopt new process systems), Deming's suggested use of statistics disappeared from American industry.

In 1945 and 1948, the post-war Japanese government asked Deming for assistance in studies of nutrition, housing, agriculture productions, and fisheries. In 1949 the Japanese Union of Scientists and Engineering (JUSE) asked him to teach SPC to industry which was having difficulty making the transition from a military to a civilian role. During the war all Japanese manufacturing was geared to the war effort. When the war ended and the military was disbanded, manufacturing systems were in disarray. Early post-war manufacturing resulted in the production of "junk." Thus the Japanese interest in improving quality.

Deming's said about the opportunity to teach Statistical Quality Control to the Japanese:

> ..a horrible thought occurred to me: Nothing will happen. It would be another chapter of what happened in America if I were not careful. I had perceived that...Statistical Quality Control was received like a flash in America...It would exist like a little fire and then burn itself out." (Source: *Personal Letter to Dr. Michael J. Cleary, dated July 26, 1982.*)

This possibility was avoided because of the initiative of Mr. Ichiro Ishikawa who brought together 45 top executives at the Industry Club to hear Deming. These managers heard him describe how they should view improvement of quality as part of a total system.

The rest, as they say, is history. Japan listened and learned from Deming. The US ignored him. Based on their value of the influence he had in the redevelopment of industry, Japan's highest award for industrial excellence is the Deming Prize. Here in America, the use of SPC and Deming's Fourteen Points have still not become part of business as usual. The crusty 93 year old Deming believes this is why we are paying the price in lost productivity and competitiveness.

PART III: WORKPLACE EDUCATION IN CONTEXT

On a hopeful note, decision making using quality improvement techniques is making slow in-roads in the U.S. and the Taylor model is slowly being dismantled. The evolution from Taylor to "high performance" work organizations is giving front-line workers more responsibility. In the "new" organizational model, workers are asked to use judgement and make decisions. Management layers disappear as front-line workers assume responsibility for many of the tasks that others used to do, from quality control to production scheduling.

Unfortunately for most of America's front line workers, the skills needed in a high performance workplace are often rusty. Quality systems depend upon workforces well grounded in basic skills, able to think critically, solve problems, and articulate their knowledge and ideas.

While 66% of American's training dollars go to college educated employees, only 30% of the US workforce is college educated. In addition, it is estimated that only 8% of front line workers ever receive training on the job.(Source: *America's Choice: High Skills or Low Wages!, National Center on Education and the Economy*, 1990.) Consequently, front-line workers have had little opportunity to enhance their basic skills.

As employers seek to transform from Taylor systems to high performance systems they are confronted with the fact that a skills deficit exists. Many employers are now turning to basic skills/adult education programs to build the skills of front-line workers.

To date, most workplace "literacy" programs are either ESL or GED based. A small number of firms, however, are now utilizing basic skills programs which relate directly to work.

Sondra Stein and Laura Sperazi have studied workplace education programs. The enclosed chart compares differences in traditional and high performance work organizations and educational programs in each type of system. A compilation of their findings is attached.(Source: "Workplace Education in Context: A Chart Comparing Traditional and High Performance Work Organizations", Sondra Stein and Laura Sperazi, NAB Conference, 1993.)

Prepared by Fran Mitchell, Employee Development Director, New River Community College

WORKPLACE BASICS
HOW TO DETERMINE IF YOU NEED A PROGRAM

In determining if a Workplace Basics program is appropriate, employers should consider the following. "Yes" answers to any of the questions MIGHT indicate a workplace literacy problem.

1. Has technology in your workplace changed in the past five years?
2. Has your organization increased in size during the last two years, especially at the lower and entry levels?
3. Has the average age of your workforce increased (younger workers leaving, older workers remaining?)
4. Have there been any significant changes in the methods of producing your product or providing your service in the last two years?
5. Have the skill requirements changed for entry level and/or lower level positions?
6. Are your employees being asked to assume more responsibilities at their current level?
7. Does your organization have a high turnover rate?
8. Are lower-level employees asked to do more reading now than in the past?
9. Has your organization increased its quality standards in the last year? (i.e. Are you applying for ISO 9000 certification? Are you implementing quality training?)
10. Has your organization been through a recent "downsizing?"
11. Has your organization changed equipment or re-tooled in the last two years?
12. Has your organization acquired or been acquired by another company in the past three years?
13. Has your organization conducted new skills training in the past, that was not successful?
14. Has your management philosophy/structure changed in the past five years?
15. Has the number of minorities, immigrants and women in your workforce increased?

Adapted from "Working Smarter Productivity Check-Up," National Alliance of Business, 1991.

2 - 4 (2 pages)

BASIC SKILLS ADVISORY TEAM INFORMATION GATHERING QUESTIONS

The following questions are samples of those which can be asked during the information gathering phase of the advisory team's work. There is no particular order which must be followed and many questions are more appropriate for some groups than for others. Collection of this information is helpful in determining the potential need and backing for a program. When answers are put to paper, they also provide good background for the instructor so that s/he understands the culture into which s/he will be working.

1. What are the goals of this company?
2. What product/service do we provide?
3. What factors contribute to making a profit?
4. Are educational records of employees available? Accurate? Up to date? Do some employees lack a high school diploma or GED?
5. How has technology in our workplace changed in the past 5 years?
6. What changes in technology do we foresee in the next five years?
7. At what level are our training manuals, policies and procedures, forms, and other materials written?
8. What are the reading, writing, comprehension, and basic math levels of our production employees? Clerical workers? Supervisors? Managers?
9. What other skills are required of our workforce (i.e. oral communication, written communication, critical thinking, problem solving, teamwork)?
10. What is our accident rate? What are the causes of accidents?
11. What is the scrap/waste rate? What are the causes?
12. What training do employees receive? (Production, clerical, supervisors, managers)
13. What percentage of the annual budget is dedicated to training?
14. Are training dollars distributed evenly throughout the workforce? Effectively distributed?

15. Is our company part of the American "quality movement?"

16. If so, what is our philosophy? Do we have a quality consultant? A quality department?

17. Are we using SPC? Which departments use it? How effective are the techniques being utilized? Do employees have sufficient math background to chart and interpret correctly?

18. Does our company encourage lifelong learning opportunities for employees? Do we have a tuition reimbursement plan? Is it used?

19. Would classes in basic skills to be part of our overall *training* philosophy (or considered *education* programs and therefore different?)

20. What is the relationship between management and the union?

21. Are you aware of any employees who may lack basic skills?

22. How does the lack of basic skills effect their performance?

23. Have any of those people missed promotion opportunities because of the lack of skills?

24. What reading is required for employees (i.e. manuals to operate equipment, employee newsletters, safety signs, routing slips)?

25. What writing skills are required (i.e. filling out forms, routing slips)?

26. What math skills are required (i.e. SPC, time cards, metric conversion)?

27. If we are pursuing ISO 9000/QS 9000 certification, how can basic skills strengthen the process?

Other appropriate questions?

FORECAST READABILITY FORMULA

For determining the difficulty level of workplace materials, the FORECAST readability formula is recommended.

FORECAST is an acronym derived from the names of the researchers who developed it – Fox, Ford, Caylor, and Sticht. Originally developed for use with military manuals, FORECAST is designed to compensate for the large number of multiple-syllable words commonly contained in technical materials in the workplace, which skew the results of readability formulas used on everyday reading materials. It has a high statistical correlation to other readability formulas and the advantage of being more accurate for use with workplace materials. It is also quick and easy to use.

To determine readability levels of workplace materials with the FORECAST formula, follow these steps:

FORECAST

- Count the number of one-syllable words in a 150-word passage.
- Divide that number by 10.
- Subtract the answer from 20

FORMULA:

$$\text{Readability} = 20 - \frac{\text{number of one-syllable words in a 150 word passage}}{10}$$

Source: Jori Philippi, Literacy at Work: The Workbook for Program Developers.

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2 - 6 (2 pages)

[Personalize to Company X]

WORKPLACE BASIC SKILLS ACTION PLAN

1. IDENTIFY THE PARTICIPANTS: Create an Advisory Team
   a. Potential team members: human resource manager, training personnel, department heads directly affected by the program (production employees, food service, maintenance), CEO, educational partners, and employees.
   b. The charge: to develop and promote a workplace basics program for employees (and their families).

2. INFORMATION GATHERING: Determine Basic Skill Levels and Requirements
   a. Interview personnel director
   b. Interview president/plant manager/CEO
   c. Interview supervisors
   d. Meet with staff management group/team
   e. Interview workers
   f. Tour facility
   g. Evaluate employee basic skills (Texas Assessment, CLOZE, TABE, interviews)
   h. Review written materials and run readability studies on: company manuals; bulletin board notices; newsletters; company forms

3. INFORMATION ANALYSIS
   a. Match skill requirements with skill levels. Determine the most appropriate program to meet stated need.
   b. Check with the Advisory Team and other participants in the process to be sure the analysis is on target.

4. **OBJECTIVES: Set program goals by taking into account interests of both employers and employees. Instruction can be individualized, team-based, or a combination. Possibilities include:**
   a. Life Skills: skills which enhance a person's ability to function effectively in society. Possibilities include:
      i. Time management
      ii. Personal finance including setting a budget or balancing a checkbook
      iii. Personal grooming
      iv. Obtaining a driver's license or library card
      v. Reading safety signs
      vi. Using the newspaper to find discounts
   b. Literacy/ABE/GED: skills and certificate programs indicating a level of competency and/or designed to help employees reach a personal goal such as the GED.
      i. Reading and comprehension
      ii. Literature
      iii. Math
      iv. Social Studies
      v. Science
   c. Basic Skills using workplace materials: the curriculum may utilize:
      i. Company vision, mission, goals
      ii. Workplace policies and procedures
      iii. Insurance forms
      iv. Material Safety Data Sheets (MSDS forms)
      v. Instruction manuals for machinery
      vi. SPC charts and graphs
      vii. Inventory reports
      viii. Shipping routes and/or routing slips
      ix. Geographical location of suppliers and customers

d. Job-Specific Skills: Basic skills programs which address job-specific skills through the development of curricula to improve skills needed to perform a specific task such as:
   - i. Improved reading skills for "pickers."
   - ii. Reading, recognizing, and understanding safety signs and company policies.
   - iii. Using the cash register.
   - iv. Memo and report writing.
   - v. Math for SPC or blue-print reading.

e. Critical Thinking Skills:
   - i. Information assessment skills: gathering and analyzing information, critical thinking, problem solving, learning-to-learn.
   - ii. Interpersonal skills: communication (listening, oral, written), motivation, self esteem, leadership.

5. LOGISTICS
   - a. Length of course
   - b. Day(s) of week class will meet
   - c. Hours per class
   - d. On or off the clock, or a combination
   - e. Location of class
   - f. Materials (filing cabinet, test books, written materials, computer software)
   - g. Identify in-house contact for the adult education program to work with.
   - h. Determine employee interest (surveys, departmental meetings)
   - i. Develop public relations campaign
     - i. Employee meetings
     - ii. Bulletin board notices
     - iii. Videos in lunchroom
     - iv. Paycheck insert - program announcement
     - v. One week open enrollment

6. IMPLEMENTATION
   - a. Finalize agreement between program partners and sign Memorandum of Agreement
   - b. Develop curriculum
   - c. Staff development for instructional staff (including a tour of the facility)
   - d. Recruit participants
   - e. Testing/book order
   - f. Begin program

7. EVALUATION
   - a. Pre-test
   - b. Post-test
   - c. Were expectations met?
   - d. Written evaluation from participants

8. CONTINUOUS IMPROVEMENT
   - a. Use evaluation results to re-design the program if needed
   - b. Determine if new needs have been identified that necessitate a program change.

2 - 7 (2 pages)

WORKPLACE BASICS ADVISORY COMMITTEE

CHECKLIST #1: Members to Include on a Workplace Basics Committee

___ Training department representative
___ Human resources department representative
___ Manager or assistant from affected department
___ Front-line supervisor(s)
___ Union steward or representative
___ One or two skilled, exemplary workers
___ One or two enthusiastic, newer workers

CHECKLIST #2: Information to Include in the Announcement

___ The general make-up of the committee
___ The size of the committee
___ The committee's assignment
___ The approximate work schedule to projected date of completion
___ The selection process

CHECKLIST #3: Advisory Committee Selection Process and Considerations

___ Has the administrative clearance been given for people to work on the project?
___ Has the approximate number of personnel on the committee been determined?
___ What mechanism(s) can be used to ensure that the announcement is circulated to all affected personnel at about the same time?
___ Is it clear to whom and by when interested people should respond? Keep in mind that it may be necessary to ask certain key people to participate. It is often not enough just to offer the opportunity?
___ Is the selection process clear?
___ Does the committee composition have the balance suggested in the previous list of committee members?

___ Does the committee include more than just experienced workers?

___ Are the individuals under consideration relatively confident, open, and communicative?

___ Can they relate well both up and down the organizational hierarchy?

___ Are any of them threatened by authority?

___ Do any of them have a history of personal animosity toward anyone?

___ In a union situation, has the union been sufficiently involved in the selection of employee representatives so as not to endanger its support of the project?

___ Are different work sites adequately represented?

[Sample] *Critical Skills Advisory Team Minutes*

Present: U, V, W, X, and Y (Z was unable to attend.)

Y opened the meeting at 1:00 p.m. Everyone introduced themselves. Y gave an overview of the purpose of the team. X talked about her job – helping business and industry in the region assess the critical skills needed by their workforce and helping develop programs to improve those skills. The team put together a list of critical skills needed at this plant, including:

- reading comprehension (especially procedures)
- oral comprehension
- verbal communication
- listening skills
- writing (control numbers, SPC charts and graphs, memos, time cards)
- self-esteem
- finding information
- being cross trained
- making decisions
- knowing how an employee's job impacts the entire plant

A few roadblocks for developing programs were named including:

- 12 hour workdays
- overtime
- different schedules in different departments

Where do we go from here?

- Team members will begin collecting written information from around the plant.
- People the production workers trust will survey workers. Possible questions:
  1. What skills do you use to do your job? (reading, writing, math, making decisions etc.)
  2. How has your job changed in the last five years?
  3. If the company sponsors classes to help employees upgrade skills (they'll be free and confidential) name three things you would most like to learn.
  4. How does your job impact our product?
- The team will work with Z in thinking about the best people to do the survey, how many people will be surveyed. Practice interviews might put people at ease.

Other ideas:

- Target a large department first (finishing?). We can't be all things to all people.
- Offer a training session for supervisors on how to interact comfortably with employees who have low skills and are embarrassed about it.
- Make a company commitment to free up class participants at the end of their shift so they can attend class.
- Help supervisors out by letting them know in advance who is in the class and when the class will meet.

Minutes by xyz

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"Satisfied Customers"

REGIONAL EMPLOYERS KEEPING COMPETITIVE THROUGH BASIC SKILLS EDUCATION

Throughout Virginia, employers are recognizing that the marketplace is changing. Regional businesses seeking to stay competitive are developing ways to increase productivity, introduce new technologies, and/or change the organization of work. Local firms are investing in human resource development through education and training opportunities.

The following regional employers have offered on-site, company sponsored basic skills and/or GED preparation classes for their employees. Call them for information and comments:

WESTERN FABRICATION COMPANY	Marshall Arts, Training Manager
Silver Spring	555-7186
HIGH TEC MANUFACTURERS	John Dough, Human Resource Manager
Lubbock	555-2111
SANDELL AUTOMOTIVE INDUSTRIES	Denton Fender, Plant Manager
Springfield	555-4630
HEARTLAND HOSPITAL	Marian Haste, Training and Development Sup't
Fairview	555-1111
WALDON, INC.	Mercedes Bends, Personnel Director
Floyd	745-2104

For additional information on
workplace basic skills programs, contact
ABE CASAS
555-1234

MARKETING BASIC SKILLS - A ROLE PLAY
Presented at 1992 Petersburg VAILL

Disclaimer: these following role play is generic in nature. We recognize that persons making contact with BIGs will vary from region to region - some are EDDs, some are adult ed administrators. In other areas Program Planners and Specialists make the contacts.

Joe: Good morning, Bob. It's good to see you again. I really enjoyed getting to know you at ASTD last month.

Bob: Yes, your comments about workplace literacy really got me thinking. Joe, I'd like you to meet Kim Jones, our plant manager. I'd like you to fill him in on some of the things we talked about at lunch.

Joe: Nice to meet you Mr. Jones. I'm Joe Smith the _position_ at _place_.. Thank you for meeting with us today. Support from top management is a vital element in every workplace basic skills program so it's great to have you with us.

Kim: I'm anxious to hear what you have to say. Bob told me about your conversation. We're making a lot of changes at this company, investing in new equipment, and quality training, and we have a suspicion that our employees might need some additional basic skills training, but we are totally in the dark about how to find out and where to go for help.

Joe: You've come to the right place. My role is to assist business and industry leaders in assessing the basic skills of their workforce to determine if the skills employees have are sufficient to meet the demands of today's complex workplace. If we discover that skills don't meet need, particularly as you look toward the future and changing technology, we can design a program geared to bridge the skills gap.

Bob: How can we be assured that what you offer is any good?

Joe: Good question. All the adult education providers in this area have a proven track record. I've brought a list of "satisfied customers" with me. Each of these companies has sponsored basic skills classes for their employees and they've all been absolutely delighted with the results. They've all volunteered to answer questions for companies who are thinking about getting into this area so please feel free to give one or more of them a call.

Bob: What will these people teach? We need to be sure it doesn't interfere with out other training.

Joe: That's one of the wonderful things about basic skills programs. Once we've determined what skills are needed, we design the program around the specific needs of this company.

We offer a number of different approaches:

journey." Are you using SPC, for example, in the manufacturing process? Have you moved to team management?

Kim: It would be safe to say that if quality were a journey of 1000 miles, we have taken the first step. We are just beginning to investigate where to turn for assistance in quality training. Right now we're checking out Crosby's Quality College and courses offered through Florida Power and Light. But, as you know, they are expensive propositions. In terms of formal training on site, we haven't gotten to that yet, but it is definitely coming. Our waste is too high, as is our accident rate, and we've got to trim fat. We're also just starting ISO certification so that will take a lot of our energies as well.

Joe: How about changes in technology? How prevalent are computers in your workplace?

Kim: We're in the process of buying $12 M of computerized equipment which we figure will last no more than 10 years. Every loom is computer oriented.

Joe: What are your plans for training your people to use the new equipment?

Bob: We're going to offer computer training - the factory rep will be coming in to do it.

Joe: Bob, does the company have educational records of employees? Do you know, for example, how many people have not graduated from high school?

Bob: Yes and no. We have records for our recent hires, since 1990, but not before that. I know we have some folks who can't read at all, but we're not sure how many. Since 1990 we've only hired HS grads, so I'm sure their skills are all OK.

Joe: Unfortunately, that's not always true. Whenever we begin basic skills classes in the workplace, we always open them up to everyone who would like to improve their skills. We always get people who graduated from HS but who feel their skills are a little rusty and would like the opportunity to brush up.

One of the things we can talk about is assessing employees to find out their reading and math levels.

Bob: How long does that take? Do you assess everyone or just volunteers?

Kim: We want everyone to have this - think we really need that information.

Joe: There are a couple of different testing instruments available. If you want to know the reading and math levels of everyone, I would suggest a test called the TABE. It takes about an hour and a half to administer. In some locations we test all employees, in other cases we do only those who volunteer to be tested. We've also used some other informal assessments. The choice is yours and really depends on the goals you set up for the program.

(1) classes designed to improve skills needed on the job (For that we develop our curriculum directly from written materials and math examples used at their specific jobs);
(2) classes designed to prepare employees who are not high school graduates to take the GED test;
(3) GED preparation classes using materials from your plant to teach the various subjects; and
(4) life skills classes designed to improve the quality of life of your workforce. (These classes might include balancing a check book, or understanding insurance policies.)
(5) classes designed to refresh basic skills to prepare employees for more advanced training, such as basic math to prepare for SPC.

We can also offer "drop in" lessons - helping people brush up on fractions, spelling, or any subject they feel they need help with.

Kim: As a business person, I don't care if our employees understand theory, particularly in math. I just want them to be able to figure out the answer they need as quickly as possible and be accurate about it.

Joe: In some of our programs, we get to that by teaching calculator skills. If the goal of the class ends up being GED preparation, we'll have to teach theory as well because calculators can't be used on the test. But if you're looking for quick and accurate math, we can offer calculator components to get people up to speed rather quickly.

Kim: A big issue with us today is quality. Can you provide me a whole package that includes quality or are you going to do just basic skills?

Joe: Our basic skills classes incorporate many of the skills needed in a quality environment. We stress working in teams. Critical thinking and problem solving skills are always enhanced in these programs. But they are side benefits.

For courses related directly to quality I'd recommend talking to the Continuing Education department at the community college or __________. They offer a host of classes from teamwork, to supervisory skills, to Quality First.

Kim: Can you integrate all that this into the basic skills program?

Joe: As I said, we can use a team approach in teaching which encourages solving problems together. Supervisory skills, classes on communication techniques, and other "human side of quality" courses are really better offered through the community college.

What I would recommend if you're interested in both areas is bringing in the AE administrator and someone from the College and together they could work out a total program which will meet your needs.

As the issue of quality has come up, will you give me a little background on your "quality

Bob: Who pays for testing?

Joe: You would pay associated costs which are really reasonable. Once you decide the testing method, I can get back to you will the actual figures. Again, the assessment instrument we use will really depend on the goals of the program, and those are dependent upon company needs for the present and the future.

Kim: Let's get quickly to the bottom line. What will the entire package cost?

Joe: Typically, the business pays for all associated costs: teacher and aide salaries and prep time, curriculum development (if it's needed), books and supplies, and an administrative fee.

Bob: I think this is a great idea, and my gut level feeling is that we really need it. But I'm confused about how to get started.

Kim: Not to mention the cost. We've really got to be conscious about cost.

Joe: That's true. But I can tell you without hesitancy that the money spent on these classes will come back to you 100 fold. What's the use of spending $12 million on equipment, if your employees don't have the reading skills to interpret training manuals?

Let me give you an example of how these programs save money. One employer three years ago had one employee who could not read well enough to understand his health benefits. Because he didn't know that his insurance would pay for his blood pressure medication, he didn't buy it. He subsequently collapsed on the job and was hospitalized for three weeks in ICU. This employer started basic skills classes to prevent that kind of problem. That one employee's hospitalization made their insurance rates sky rocket. They could have paid for 50 classes from that one expenditure alone.

Kim: Give me a ball park figure. What are we talking about here?

Joe: Each program is unique and therefore different in price. If you offer a GED class for example for 20 employees, for 48 hours of instruction, using materials from your workplace, the price would run somewhere about $4,000. That comes out to be less than $4.25 per training hour and it includes books and supplies, paying for the GED testing fee, teaching and aide salary and the cost of curriculum development. It's a drop in the bucket comparatively.

Bob: If we were to do this, when would you hold classes?

Joe: We've used three different models and, interestingly, they have each worked: on the clock, off the clock, or a combination. The choice depends on your philosophy - where or not you consider basic skills as education or training. If it's part of your philosophy, on the clock works best and retention is very high. This, like many other decisions, will be part of what your Advisory Team will look at in the coming months.

The bottom line for us is that we try to be as flexible as possible to meet your individual needs. We're now teaching one class from 10 pm to midnight on Friday nights - that's what the company wanted so that's what we provided.

Bob: If we decide to sponsor a program, how do we get started?

Joe: There are certain issues the company has to decide. Here's a sample action plan that you might want to follow. It lists the pertinent areas that you'll have to decide in order to get started. The next step would be for you to form your Advisory/Planning Team. I will bring Jane Jones, the person who will administer the program, to a meeting with that group and we can begin to talk about specifics.

Bob: We've tried training programs like this before but they didn't work. How do you get people to come out of the closet and admit they need help?

Joe: We do small group presentations involving the administrator, teacher, and sometimes me so that employees have the opportunity to talk to us first hand. That way we can take some of the fear out of the process. We like to have someone from management endorse the program at those meetings so employees know that their jobs aren't in jeopardy if they sign up. We stress the confidential nature of the program and the fact that it will be very different from what they remember from school.

Ten companies in the region sponsored programs this year and every one was a success. I really hope we can add you to the list.

Mary: Well, we'll certainly give it serious consideration.

Joe: I call you next Tuesday at 10:00 a.m. to find out where we go from here? Thank you so much for meeting with me today. I know you'll be delighted with the results.

SAMPLE BASIC SKILLS WORKPLACE PARTNERSHIP AGREEMENT

In order for employees to improve their basic educational skills by participating in a workplace basic skills program, the education partner agrees to:

1. Help recruit employee participants for educational programs.
2. Find class location if on-site space is not available.
3. Find teachers or tutors as appropriate for instructional needs.
4. Help select and order materials.
5. Pre-test employees, when appropriate, to determine instructional programs appropriate for levels of academic functioning.
6. Organize classes based on employee needs and the adult education workplace continuum.
7. Post-test participants, when appropriate, to determine gains made while in the program.
8. Schedule GED testing, if appropriate.
9. Obtain participant and supervisor evaluation comments for continuing or improving program quality.

To receive workplace basic skills program services, the workplace partner agrees to:

1. Furnish, if available, information as needed about employees' educational attainment, total number and percent of employees lacking high school diplomas, and an estimated number of employee participants.
2. Adopt the service as a company-wide program and communicate this to employees.
3. Designate an employee to serve as a site coordinator who will work with the education program to recruit participants and facilitate instruction.
4. Provide a facility tour to all instructional staff (instructors, aides, and volunteers) at a mutually agreed upon time and provide workplace information (mission, vision, product, etc.) for instructional purposes, if appropriate.
5. Offer and publicize to employees the following incentives (check all incentives that are appropriate for your situation)

Sample Basic Skills Workplace Partnership Agreement - Page 2

____ Furnish space for on-site instruction.

____ Furnish instructional materials for employee participants (costs vary according to employee needs and quantities ordered from $25 - $50 each)

____ Pay instructors and aides at the standard per-hour wage including both contact and preparation hours.

____ Allow adjustment of employee work schedules for classes accommodating multiple employees.

____ Offer paid release time (full or partial) for class attendance.

____ Offer an educational bonus (time or money) upon passing the GED test.

____ Pay the GED test fee ($25 per person).

____ Other (describe) ____

Workplace Manager ____

Facility ____

Date ____

Education Partner ____

Date ____

Return to:

Program Coordinator
Address

A Conversation on Workplace Education with an Employer Representative

(Adult educators attending the Region XII Adult Education Program on January 17, 1995, in Martinsville, VA, participated in a question and answer session with Glenda Harrell, at that time Supervisor of Training and Quality Systems at a local manufacturing facility. These notes were published as an article in the June 15, 1995 issue of *Progress.)*

Why is workplace education important?

- The basic skills of entry level employees may be unknown or unreliable. There may never have been a high school diploma/GED requirement at the workplace, or it may have become a requirement only in recent years. There may be a wide range of academic skill levels among those employees who do have a diploma or GED.
- A sound foundation in generic basic skills is critical to an employee being able to learn workplace-specific training; ie, math → SPC, writing → documentation, reading → work instructions or safety information, etc.
- The "pool" of entry level candidates is shrinking. Employers will have to hire whomever they can to get the number of people they need, and then provide basic skills refresher and train them in job-specific skills for the workplace.
- Lifelong learning will be required in a constantly changing work environment. It will not be possible for a person to "front load" all the education needed for a lifetime and think it will carry him/her through.

Why is using local resources important?

- cost effectiveness for the employer
- flexible scheduling for the employer
- familiarity with the local culture
  (It is reasonable to think that if an employer uses adult educators who live and work in the same community as the employees that these resources would be familiar with the school systems, the community, etc. In many cases, the adult educators might know more about the "culture" of the employees than do the employers, especially in a workplace where managers tend to "come and go".)

What do companies expect of workplace instructors/programs?

(I'm not sure they know what to expect; I'm not sure that have a clear picture. What should they expect? What do they need? Let's take a look at that.)

- Workplace educators need to know more about employers' needs that employers, themselves, do. Employers may be able to describe their situation to you in terms of what they can see happening right now. They may not be as able to trace back to "why" that situation exists. Therefore, adult educators must be adept in asking the right questions to get at these answers.

- Employers may expect adult educators to bring in ready-made solutions and "fix" problems in a timely fashion (translated: "fast"). Since job skills training is often provided in one-time event increments, employers may think that basic skills training can be similarly accomplished, not realizing that basic skills improvement is more of a development process. WARNING: You may have to figure out how to deliver basic skills training in way other than what you are used to.

- Employers understand numbers. That's a "currency" they use to measure things. And they're very results oriented; therefore, they'll want to know how to measure the effectiveness of these efforts and they'll want to see quantifiable results. (I'm not saying this can be done, or is easily done, or should be done; I'm just saying it might very well be an expectation that you'll want to be prepared for.)

What is type of language do workplace educators need to use?

- Certainly the language of quality: "customer", "supplier", "meeting the requirements", "doing it right the first time", "continuous improvement". Also, a concept that's becoming more entrenched is the idea of "systems". Think and talk in terms of "systems" and how they interrelate.

- Replace education-ese with business/industry terms. (It's fairly easy to do because the two groups are usually working with the same concepts, just using different labels.) For example, "co-operative learning" in the classroom becomes 'team-based structure" in the workplace.

- A word that I try to avoid is "program". Negative connotations have become associated with it among employers and employees, especially employees. It sounds like the "flavor of the month. I would substitute a word like "effort" or initiative, or even something more general, such as, "Are you doing anything *around* basic skills?"

What are things instructors can do to prepare themselves to work in workplace programs?

- a site tour (just to get a general idea of the "lay of the land")
- a site visit (more detailed than a site tour; make a superficial literacy observation: look at forms, documents, digital displays/readouts, measuring devices such as scales, micrometers, rulers; look at process flow charts)
- obtain business/manufacturing information (orientation videotapes, brochures)
- Be prepared for budget cuts, or for money to suddenly not be available for some other reason. Convince the employer from the outset that this type of employee development is not expendable. And while we're on the topic of money, be sure to represent the financial needs of your effort accurately from the beginning. Don't feel as though you have to look "bare bones" to stand a chance of being accepted and continued. Just make sure that what you're offering will be "value added".
- Before, during, and throughout training, be available to interact with employees in other than the student/instructor classroom relationship (annual picnic or dinner, plant-wide training such as diversity or communications, literacy fairs, etc.) Don't do any of these things, however, if they don't seem natural and meaningful to you. Superficial efforts to build rapport can backfire and do more harm than good.
- Read a book. One that Stacey Wright and read together and found very helpful is *Improving Workforce Basic Skills: The Foundation for Quality* by Larry Moore. This book is published by Quality Resources. (Contact: One Water Street, White Plains, NY 10601; Telephone 1-800-247-8519 or 914-761-9600.)

Why is customizing workplace programs so important?

- Customizing workplace programs is required because each workplace situation is different. Employers may have their own preferences or constraints around scheduling, frequency, who shall attend, testing, etc.
- In the area of content, customizing basic skills training to the workplace is needed because functional context instruction will be more meaningful to learners. The employees, themselves, can help you identify forms, documents, manuals, etc. that can be used as materials. They know what's causing them difficulty.

Teacher/Ethnographer in the Workplace: Approaches to Staff Development

I. Introductions

II. An overview of ethnography, stages, and tips

III. Two models of data collection
    A. Photography
    B. Interviewing

IV. Group work, practicing the two models

V. Debriefing - What did you discover?

VI. Questions and comments

WHAT IS ETHNOGRAPHY?

Ethnography is the study and systematic recording of human culture. An ethnography is an analytic description or reconstruction of a cultural scene or group (Spradley and McCurdy).

It is a form of qualitative research which includes descriptions of people, places, languages, events, and products. The data is collected by means of observation, interviewing, listening, and immersion with the least amount of distortion and bias.

WHY USE ETHNOGRAPHY IN THE WORKPLACE?

- Teaching in the workplace is different from teaching in an adult education program
- Instructors are totally unfamiliar with the culture
- It enables instuctors to identify learning needs
- It involves *all* company personnel

GOAL

The goal of ethnography in the workplace is to understand the workplace from the insider's perspective. The data will then be synthesized, analyzed, and used to create an effective workplace educational program.

STAGES OF ETHNOGRAPHIC RESEARCH

open-ended,
inductive

↕

structured
observation

↕

analysis

↕

speculation,
sharing

A. open-ended , inductive
   1. determine what ideas,questions, concerns you would like to or need to research
   2. do NOT let first impressions guide your research; attempt to be scientific and responsible, continue for more knowledge and understanding

B. structured observation
   1. need to shift and narrow the focus
   2. determine methods for data collection: interactive and noninteractive
      interviews,photographs,focus groups,documents,meetings,surveys,readings,participant observations
   3. continually reexamine and refine

C. analysis
   1. take your work to conclusion:
      documentation record → new knowledge → new reality
   2. study, plan, and implement action to be taken

D. speculation and sharing
   1. monitor and evaluate your work
   2. determine what needs to be shared with colleagues and the public: What can these 2 groups benefit from with your ethnographic findings?

TIPS FOR THE ETHNOGRAPHER IN THE WORKPLACE

1. Revel in your ignorance. Everyone knows that you didn't study aluminum processing in college. Practice being a student again.
2. Always tell the participant what you are doing, what you are trying to learn, and what you will do with the information.
3. Make your presence agreeable and mutually rewarding.
4. Be sensitive to keep feedback within appropriate company and personnel structure.
5. Incorporate the information you gather into your lesson plans.
6. Be sensitive around issues of immigration status. Learners may feel nervous talking about voting, social security numbers, etc.
7. Conduct your photo and interviewing sessions before your class starts and **continue** as the class progresses.
8. Pass on the tools of ethnography to the learners. Ethnographic analysis can help them learn more about the company and the world outside of work.

PHOTO TOPIC AGENDA

- environmental location of company
- tools, raw product/materials, finished product, equipment
- utilization of tools and equipment
- product process
- function of, storing, and transporting of product
- departments, various positions and levels
- individual employee shots
- Signs and bulletin boards

TIPS

1. Photographs should reflect the most undisturbed process and behavior.
2. Photographs should allow a variety of people over time to make their own deductions.
3. Photographs should be contextually complete.

REASONS TO USE PHOTOGRAPHS

1. To have an accurate and detailed record of the workplace
2. To identify the swiftly-changing technology and environment in the workplace
3. To allow for active participation and sharing of the research project
4. To create an image that can be used for later analysis and use in the classroom
5. To be able to understand the workplace concept as a whole

QUESTIONS FOR PHOTOGRAPHS

KNOWLEDGE Level 1	-What is...? -Where is...? -How would you describe...? -Can you list the three...?
COMPREHENSION Level 2	-How would you compare...? contrast...? -Can you explain what is happening...? -What is the main idea of...?
APPLICATION Level 3	-How would you use...? -What would result if...? -What items would you select to show...?
ANALYSIS Level 4	-What is the relationship between...? -Why do you think...? -What conclusions can you draw...?
SYNTHESIS Level 5	-How would you improve...? -Suppose you could____ what would you do...? -Can you predict the outcome if...? -How would you test...?
EVALUATION Level 6	-What is your opinion of...? -How would you prioritize...? -How would you evaluate...?

Based on Bloom's Taxonomy

THE ETHNOGRAPHIC INTERVIEW
Question Types

I. Grand Tour Questions

The goal of the *grand tour question* is to find out the names of places and objects, to meet and/or hear about people, to observe and/or hear about events or activities, and to begin to understand how all of these elements interrelate. There are four types of grand tour questions: the general overview, the specific tour, the guided tour, and the task-related grand tour

Examples

A. *General Overview - Ask the informant to generalize, to discuss patterns of events*
    Could you describe a typical day on the job?
    Could you show me/tell me how you usually make a box?

B. *Specific Tour - Ask the informant about a specific incident or what he or she did on a certain day*
    Could you describe what happened at the recognition ceremony yesterday, from beginning to end?
    Tell me about the last time you used the crane.

C. *Guided Tour - Ask the informant for a tour of the workplace or to accompany him or her while doing a job*
    Could you show me around the plant?
    Could I go on a sales call with you?

D. *Task-Related Grand Tour - Ask the informant to perform a task to help you understand the context*
    Could you draw a flow chart of how the aluminum moves through the plant, from raw metal to the finished product?
    Could I watch you use the cutting machine and ask you questions about it afterwards?

II. Mini-Tour Questions

The purpose of a *mini-tour question* is the same as that of the grand tour question. The difference is that a mini-tour question deals with a much smaller aspect of experience. For example, if you said to an informant, "Tell me about a typical day at General Aluminum Products" and you heard the informant say again and again, "Then I run the coil through the annealing machine." You might then decide to ask a mini-tour question such as, "Describe what goes on when you run the coil through the annealing machine." The mini-tour question puts a magnifying glass on an activity or area that you think is important.

Adapted from *The Ethnographic Interview* by James Spradley 1979

III. Example Questions

Example questions are usually woven throughout the ethnographic interview. An informant might say, "My supervisor gave me a hard time about OSHA regulations yesterday," and you might ask, "Can you give me an example of your supervisor giving you a hard time?" It is easy to assume that we share the same idea of what a hard time is, but surprising differences exist.

IV. Experience Questions

Open-ended *experience questions*, such as "Could you tell me about some experiences you've had working on the annealing machine?" are often used after a number of grand-tour and mini-tour questions. Experience questions are sometimes difficult for people to answer. They often prompt informants to tell about their unusual experiences, as opposed to the more typical experiences.

V. Native-Language Questions

If your informant is a non-native speaker of English, you speak that language, and it's appropriate to conduct the interview in this language, by all means, do so. However, what is meant by *native-language questions* here is more about using the terms that the informant uses to talk about the job. For example, if hot aluminum coils are cooled in a pressurized air containment cooling unit that your informant calls "the blower room," call it the blower room. Ask questions such as, "How long does it stay in the blower room?' The more you can get informants to talk about work the way they think about work, the better. This will give you a window into how they think about things, as well as how they talk about things, and will help establish rapport. There are three types of native-language questions: direct-language questions, hypothetical-interaction questions, and typical-sentence questions.

A. *Direct-Language Questions - Ask the informant how he or she would say something*
    What do you call it when you mismeasure a piece?
    How do you refer to your work area?
B. *Hypothetical-Interaction Questions - Set a scene for the informant. Describe the people involved (talking with a supervisor about a production problem) and try to get him or her to talk the way they would in that situation*
    If you were talking with a co-worker, would you say it that way?
    If I were on the factory floor, what kind of things would I hear co-workers saying to each other?
    How would you say that to your supervisor?
    C. *Typical-Sentence Questions - Ask directly for typical sentences or activities*
    What are some sentences that use the words blower room?

Adapted from *The Ethnographic Interview* by James Spradley 1979.

ETHNOGRAPHIC ACTIVITY SHEET

Your name **Your informant** **Date** **Company** **Focus of interview**		
Questions	**Responses**	**Interpretations**

BENEFITS OF USING PHOTOGRAPHS AND INTERVIEWS IN WORKPLACE CLASSES

1. They establish communication between strangers.
2. They enlarge and strengthen data.
3. They can help to transition from unfamiliar to familiar context.
4. They offer a specific, concrete point of reference for the interviewee/participant : the workplace and the photograph.
5. They create a less stressful and anxious environment.
6. They place the interviewee/participant in a lead, active role.
7. They facilitate collection of data for those unfamiliar or uncomfortable with the method.
8. They offer the opportunity for the interviewee/participant to demonstrate his/her expertise.
9. They allow for less inhibiting, more factual, precise responses (photos).
10. They provide information that can be maintined and utilized over a period of time.

WORKPLACE EDUCATION VERSUS ADULT BASIC EDUCATION

	Workplace Education	Adult Basic Education
Instructor's Roles	• to become familiar with the company culture and products • to upgrade skills of the employees in response to employees' and employers' needs	• to become familiar with the characteristics of adult learners • to upgrade skills of the students in response to their needs and the communities' needs
Course Goals	• students and instructors customize goals to meet company and student education needs • course goals are based on functions to be performed in the workplace	• students select course and are placed by an entry level assessment • course goals focus on life skills and are often predetermined by educational level of student
Instructional Methods and Strategies	• are chosen based on the workplace environment, learner needs, and the curriculum	• are chosen based on the choices of students, instructors, and adult education departments
Assessment	• instructor creates assessments based on specific objectives through a variety of methods	• instructor usually employs standardized tests in combination with more subjective measures
Transfer of Learning	• emphasis is on transferring new skills to students' jobs, their personal lives, and their communities	• emphasis is on transferring new skills to students' personal lives and their communities
Texts and Resources	• primary texts and resources used are authentic to the workplace • employees' jobs determine the materials used in classroom instruction	• primary texts and resources focus on life skills for the adult student • students' needs determine the materials used in classroom instruction

A List of Basic Skills for the Workplace

This is a general list of occupational basic skills to connect language to work materials and tasks. In this list, reading and writing precede listening and speaking. This was done to show that reading and writing instruction can contribute to the development of effective spoken language communication at work.

Language

Occupational vocabulary

(General, technical, and conceptual terms)

1. Identify words in context.
2. Recognize meaning of terms
3. Identify abbreviations and symbols.
4. Identify sound patterns in words.
5. Identify roots, prefixes, suffixes.
6. Recognize spelling differences between words.

Reading

(Text formats: passages containing occupational content; rules, instructions, procedures, checklists, case studies, memos, letters, bulletins, brochures, newsletters, catalogs, manuals, textbooks, tests, reports, legal documents, non-text formats: tables, charts, graphs, diagrams, illustrations)

A. General reading skills.
   1. Recognize main idea and details.
   2. Recognize idea relationships (sequence, comparison, causation).
   3. Recognize purpose, parts, and reading strategies associated with various formats.
   4. Transform and infer information (paraphrase, classify, conclude, summarize).
   5. Recognize errors or inconsistencies in presented information.
   6. Recognize comprehension problem, source, and reason.

B. Occupation-specific applications
   1. Determine topic or gist of material.
   2. Locate individual facts or specifications in text.
   3. Follow detailed directions to complete a task.
   4. Follow sequenced illustrations to complete a task.
   5. Locate page, title, paragraph, figure, or chart needed to answer a question or solve a problem.
   6. Use skimming or scanning to determine if text contains relevant information.
   7. Cross-reference information in tables or charts.
   8. Apply information to locate malfunctions or decide on a course of action.

Writing

- A. Recording (Occupational forms)
  1. Copy words or codes from one document to another.
  2. Place routine identification information on forms (names, addresses, dates, times).
- B. Routine notes and messages (Phone messages, informal notes, brief memos)
  1. Legibly record spoken statements.
  2. Complete standard forms.
  3. Communicate routine information (descriptions, directions, requests, replies).
- C. Storing, retrieving, and organizing (Labels, lists, notes, outlines, diagrams)
  1. Use labels to tag information for later use.
  2. Use lists and notes to store and retrieve information.
  3. Use outlines and diagrams to plan, remember, and organize information and actions.
- D. Authoring (Formal messages, memos, letters, reports)
  1. Decide on subject, purpose, audience, and format.
  2. Limit subject and focus according to purpose, audience and format.
  3. Organize information into paragraphs and sentences.
  4. Review and edit for completeness, clarity, paragraph development, sentence grammar, and punctuation.

Listening
(Directions, conversations, conferences, meetings)

- A. Verbal and non-verbal information
  1. Follow spoken directions.
  2. Extract information from extended message.
  3. Follow line of thought as it develops among several speakers.
  4. Place information in the "big picture."
  5. Recognize non-verbal information (tone, gesture, attentiveness).
- B. Analysis and evaluation
  1. Recognize shifts in communication purpose.
  2. Determine underlying assumptions and biases.
  3. Evaluate message in terms of credibility, usefulness, and appropriateness.

Speaking

- A. Workplace communication (Messages, requests, reminders, instructions, warnings, greetings, personal expression)
  1. State information concisely and efficiently.
  2. Check that message has been understood.
  3. Display responsive and appropriate language behavior.

B. Public contact (Phone, face-to-face)
  1. Use question and answer format to establish and meet need.
  2. Provide accurate and adequate information and referral.
  3. Keep up company's positive image.

C. Problem solving, decision making, planning
  1. Contribute information in keeping with the general topic.
  2. Express opinions and judgments (use feelings, logic, aesthetics, ethics, or experience).
  3. Develop and evaluate ideas (use analogy, generalize, hypothesize, explore implications, suggest alternatives).
  4. Support group process.

Math

Numbers
A. Whole numbers
  1. Recognize use (counting, ranking, identifying) of number.
  2. Read, write, and count numbers.
  3. Add, subtract, multiply, and divide.
  4. Solve occupational word problems.

B. Fractions
  1. Recognize concept of fraction.
  2. Read, and write fractions.
  3. Add, subtract, multiply, and divide.
  4. Solve occupational word problems.

C. Decimals
  1. Recognize concept of decimal.
  2. Read and write decimals.
  3. Compute using money.
  4. Round off decimals..
  5. Add, subtract, multiply, and divide.
  6. Solve occupational word problems.

D. Percent
  1. Recognize concept of percent.
  2. Read and write percents.
  3. Compute using percents.

E. Conversions
  1. Relate fractions, decimals, and percents.
  2. Convert from one to another.

F. Mixed Operations (multi-step problems)
  1. Solve occupational word problems using more than one operation.
  2. Compute averages.

Measurement

- A. English and Metric systems
  1. Read and write measures.
  2. Use device to measure.
  3. Convert English to Metric and/or Metric to English.
  4. Convert from one unit to another within a single system.
- B. Time
  1. Read and tell time (traditional and digital).
  2. Read 24-hour clock.
- C. Calculator
  1. Recognize functions.
  2. Use calculators to solve occupational problems.

Estimation

1. Recognize concept of estimation.
2. Estimate measurement (length, angle, capacity).
3. Compute using estimation (rounding).
4. Determine reasonableness of results using estimation.

Algebra

1. Find an unknown value using a formula.
2. Identify appropriate formula.

Geometry (Shapes and Angles)

1. Recognize concepts of parallel, perpendicular, triangle, rectangle, square, and circle.
2. Recognize and name shapes (triangle, square, circle, rectangle).

Statistics

1. Collect and organize data into tables, charts, graphs, and maps.
2. Use coordinate systems (tables, charts, graphs, maps).
3. Use simple statistics in decision-making:
   - a. average (mean, central tendency)
   - b. spread (range, dispersion)

1. These items are taken from Drew, R.A. & Mikulecky, L. Appendix A. How to Gather and Develop Job Specific Literacy Materials for Basic Skills Instruction, School of Education, Bloomington, Indiana).

Figure 1

Applications of Reading Skills Found in the Workplace

Vocabulary:

- Recognizing common words and meanings, task-related words with technical meanings, and meanings of common abbreviations and acronyms.

Literal Comprehension:

- Identifying factual details and specifications within text, following sequential directions to complete a task, and determining the main idea of a paragraph or section.

Locating Information Within a Text:

- Using table of contents, index, appendices, glossary, systems or subsystems.
- Locating pages, titles, paragraphs, figures, or charts needed to answer questions or solve problems.
- Skimming or scanning to determine whether or not text contains relevant information.
- Cross-referencing within and across source materials to select information to perform a routine.
- Using a completed form to locate information to complete a task.

Comparing and Contrasting:

- Combining information from multiple sources that contribute to the completion of a task.
- Selecting parts of text or visual materials to complete a task.
- Identifying similarities and differences in objects.
- Determining the presence of a defect or extent of damage.
- Classifying or matching objects by color, size, or significant marking.
- Distinguishing between relevant and irrelevant information in text or visuals.

Recognizing Cause and Effect; Predicting Outcomes:

- Using common knowledge for safety.
- Applying preventative measures prior to task to minimize problems.
- Selecting appropriate course of action in emergency.

Using Charts, Diagrams, Schematics:

- Reading two- or more column charts to obtain information.
- Locating chart information at intersections of rows and columns.
- Cross-referencing charted material with text.
- Applying information from tables or graphs to locate malfunctions or select actions.
- Using flow charts and organizational charts to sequence events, arrive at a decision, or problem solve.
- Identifying components within a schematic.
- Isolating problem components in schematics, tracing to cause of problem, and interpreting symbols.
- Identifying details, labels, numbers, parts of an illustration, parts from a key or legend.
- Following sequenced illustrations as a guide.
- Interpreting three dimensional drawings of objects for assembly or disassembly.

Inferential Comprehension:

- Determining meaning of figurative, idiomatic, or technical usage of terms, using context clues as reference.
- Making inferences from text; organizing information from multiple sources into a series; interpreting codes and symbols.

(Phillippi, 1988)

Figure 2

Applications of Writing Skills Found in the Workplace

Production :
- •Writing key technical words accurately on forms.
- •Spelling task-related words and abbreviations correctly.

Information Transfer (Single Step/Source) :
- •Entering appropriate information onto a form.
- •Recording essential information that involves more than one sentence.
- •Recording essential information in phrases or simple sentence form accurately and precisely.

Information Transfer (Multiple Steps/Sources) :
- •Transferring numbers, codes, dates, figures from equipment or written sources onto appropriate sections of forms.
- •Writing a report including necessary support documentation or classification.

Translation :
- •Writing brief, descriptive accounts of activities or transactions performed.
- •Outlining a situation by identifying key ideas and supporting details.
- •Summarizing essential details for a written communication, using a problem-solving or new-writing heuristic.
- •Selecting relevant details for a written communication.
- •Stating general impressions of an event or situations as they relate to specific reporting goals.
- •Summarizing events and precise dialogue in an accurate, complete, and objective manner.
- •Summarizing the major points presented in a written communication.
- •Generating a written communication according to a specific format (e.g., memorandum, telex, or letter).

Extension/Interpretation :
- •Identifying objectives, intent, target audience, and all essential and supporting details of a written communication.
- •Generating a written communication, arranging events sequentially.
- •Writing brief justifications for actions taken and providing good reasons for rejecting alternative actions.
- •Appraising a written communication and making adjustments to improve clarity.

(Mikulecky, 1982; Mikulecky, Ehlinger, & Meenan, 1987; U.S. Army, 1988; Philippi,1988)

Figure 3

Applications of Computation and Problem-Solving Skills in the Workplace

Whole Numbers

- Read, write, and count single and multiple digit whole numbers.
- Add, subtract, multiply, and divide single and multiple digit numbers.
- *Use addition, subtraction, multiplication, and division to solve problems with single and multiple digit whole numbers.
- *Round off single and multiple digit numbers.

Fractions

- Read and write common fractions.
- Add, substract, multiply, and divide common fractions.
- *Solve problems with common fractions.

Decimals

- Carry out arithmetic computations involving dollars and cents.
- Read and write decimals in one and more places.
- *Round off decimals in one and more places.
- Add, substract, multiply and divide decimals in one and more places.
- *Solve problems with decimals in one and more places.

Percents

- Read, write, and compute percents.

Mixed Operations

- *Convert fractions to decimals, percents to fractions, fractions to percents, percents to decimals, common fractions or mixed numbers to decimal fractions, and decimal fractions to common fractions or mixed numbers.
- *Solve problems by selecting and using correct order of operations.
- Perform written calculations quickly.
- Compute averages.

Measurements and Calculation

- *Read numbers or symbols from time, weight, distance, and volume measuring scales.
- *Use a measuring device to determine an object's weight, distance, or volume in standard (English) units or metric units.
- *Perform basic metric conversions involving weight, distance, and volume.
- *Use a calculator to perform basic arithmetic operations to solve problems.

Estimations

- *Determine if a solution to a mathematical problem is reasonable.

[*Indicates skills directly involved with using problem-solving strategies or interpretation.]

(Greenan, 1984; Phillippi, 1988.)

Applications of Reading Skills Found in the Workplace

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Vocabulary: *Recognizing common words and meanings, task-related words with technical meanings, and meanings of common abbreviations and acronyms.				
Literal Comprehension: *Identifying factual details and specifications within text, following sequential directions to complete a task, and determining the main idea of a paragraph or section.				
Locating Information within a Text: *Using table of contents, index, appendices, glossary, systems, or subsystems. *Locating pages, titles, paragraphs, figures, or charts needed to answer questions or solve problems. *Skimming or scanning to determine whether or not text contains relevant information. *Cross-referencing within and across source materials to select information to perform a routine. *Using a completed form to locate information to complete a task.				
Comparing and Contrasting: *Combining information from multiple sources that contribute to the completion of a task. *Selecting parts of text or visual materials to complete a task. *Identifying similarities and differences in objects. *Determining the presence of a defect or extent of damage. *Classifying or matching objects by color, size, or significant marking. *Distinguishing between relevant and irrelevant information in text or visuals.				
Recognizing Cause and Effect; Predicting Outcomes: *Using common knowledge for safety. *Applying preventive measures prior to task to minimize problems. *Selecting appropriate course of action in emergency.				

[*Indicates skills directly involved with using problem-solving strategies or interpretation.]

2 – 18 (2 pages)

Applications of Reading Skills Found in the Workplace (continued, page 2)

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Using Charts, Diagrams, Schematics: *Reading two- or more column charts to obtain information. *Locating chart information at intersections of rows and columns. *Cross-referencing charted material with text. *Applying information from tables or graphs to locate malfunctions or select actions. *Using flow charts and organizational charts to sequence events, arrive at a decision, or problem solve. *Identifying components within a schematic. *Isolating problem components in schematics, tracing to cause of a problem, and interpreting symbols. *Identifying details, labels, numbers, parts of an illustration, parts from a key or legend. *Following sequenced illustrations as a guide. *Interpreting three dimensional drawings of objects for assembly or disassembly.				
Inferential Comprehension: *Determining meaning of figurative, idiomatic, or technical usage of terms, using context clues as reference. *Making inferences from text; organizing information from multiple sources into a series; interpreting codes and symbols.				

(Philippi, 1988)

[*Indicates skills directly involved with using problem-solving strategies or interpretation.]

Applications of Writing Skills Found in the Workplace

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Production: *Writing key technical words accurately on forms. *Spelling task-related words and abbreviations correctly.				
Information Transfer (Single Step/Source): *Entering appropriate information onto a form. *Recording essential information that involves more than one sentence. *Recording essential information in phrases or simple sentence form accurately and precisely.				
Information Transfer (Multiple Steps/Sources): *Transferring numbers, codes, dates, figures from equipment or written sources onto appropriate sections of forms. *Writing a report including necessary support documentation or classification.				
Translation: *Writing brief, descriptive accounts of activities or transactions performed. *Outlining a situation by identifying key ideas and supporting details. *Summarizing essential details for a written communication, using a problem-solving or new-writing heuristic. *Selecting relevant details for a written communication. *Stating general impressions of an event or situations as they relate to specific reporting goals. *Summarizing events and precise dialogue in an accurate, complete, and objective manner. *Summarizing the major points presented in a written communication. *Generating a written communication according to a specific format (e.g., memorandum, telex, or letter).				

[*Indicates skills directly involved with using problem-solving strategies or interpretation.]

2 - 19 (2 pages)

Applications of Writing Skills Found in the Workplace (continued, page 2)

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Extension/Interpretation: *Identifying objectives, intent, target audience, and all essential and supporting details of a written communication. *Generating a written communication, arranging events sequentially. *Writing brief justifications for actions taken and providing good reasons for rejecting alternative actions. *Appraising a written communication and making adjustments to improve clarity.				

(Mikulecky, 1982; Mikulecky, Ehlinger, & Meenan, 1987; U.S. Army, 1988; Philippi, 1988)

[*Indicates skills directly involved with using problem-solving strategies or interpretation.]

Applications of Computation and Problem-Solving Skills Found in the Workplace

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Whole Numbers: *Read, write, and count single and multiple digit whole numbers. *Add, subtract, multiply, and divide single and multiple digit numbers. *Use addition, subtraction, multiplication, and division to solve problems with single and multiple digit whole numbers. *Round off single and multiple digit numbers.				
Fractions: *Read and write common fractions. *Add, subtract, multiply, and divide common fractions. *Solve problems with common fractions.				
Decimals: *Carry out arithmetic computations involving dollars and cents. *Read and write decimals in one and more places. *Round off decimals in one and more places. *Add, subtract, multiply, and divide decimals in one and more places. *Solve problems with decimals in one and more places.				
Percents: *Read, write, and compute percents.				
Mixed Operations: *Convert fractions to decimals, percents to fractions, fractions to percents, percents to decimals, common fractions or mixed numbers to decimal fractions, and decimal fractions to common fractions or mixed numbers. *Solve problems by selecting and using correct order of operations. *Perform written calculations quickly. *Compute averages.				

[* Indicates skills directly involved with using problem-solving strategies or interpretation.]

2 - 20 (pages)

Applications of Computation and Problem Solving Skills Found in the Workplace (continued, page 2)

(Reformatted to aid documentation)

Skill	*Low*	*Med*	*High*	*Notes*
Measurements and Calculation: *Read numbers or symbols from time, weight, distance, and volume measuring scales. *Use a measuring device to determine an object's weight, distance, or volume in standard (English) units or metric units. *Perform basic metric conversions involving weight, distance, and volume. *Use a calculator to perform basic arithmetic operations to solve problems.				
Estimations: *Determine if a solution to a mathematical problem is reasonable.				

(Greenan, 1984;Philippi, 1988)

[* Indicates skills directly involved with using problem-solving strategies or interpretation.]

WAGE: Essential Skills

1. READING.

1.A. Identifying factual details and specifications within a text.
1.B. Following sequential, procedural directions to complete a task.
1.C. Locating pages, titles, paragraphs, figures, or charts needed to answer questions or solve problems.
1.D. Skimming and scanning to determine whether or not text contains relevant information.
1.E. Using a completed form to locate information to complete a task.
1.F. Selecting parts of a text or visual materials to complete a task.
1.G. Identifying similarities and differences in objects.
1.H. Determining the presence of a defect or damage.
1.I. Classifying or matching objects by color, size, or significant marking.
1.J. Distinguishing between relevant and irrelevant information in text or visuals.
1.K. Using common knowledge for safety.
1.L. Applying preventative measures prior to a task to minimize problems.
1.M. Selecting the appropriate course of action in an emergency.
1.N. Reading two or more column charts to obtain information.
1.O. Locating chart information at intersections of rows and columns.
1.P. Identifying details, labels, numbers, parts of an illustration, parts from a key or legend.
1.Q. Following sequenced illustrations as a guide.
1.R. Interpreting codes and symbols.

2. WRITING.

2.A. Writing key technical words accurately on a form.
2.B. Spelling task-related words and abbreviations correctly.
2.C. Entering appropriate information onto a form.
2.D. Transferring numbers, codes, dates, figures from written sources onto appropriate sections of a form.

3. MATHEMATICAL/PROBLEM-SOLVING.

3.A. Performing whole number operations.
3.B. Using fractions and decimals.
3.C. Performing mixed operations.
3.D. Measurement and calculations.
3.E. Estimations.
3.F. Define the problem.
3.G. Organize fact-finding questions.
3.H. Gather information from appropriate sources.
3.I. Analyze data to locate problem.
3.J. Examine possible solutions to provide short-term fix & long-term solution.
3.K. Choose the best solution.

mike Willbanks
Governor's Commission on Adult Literacy
221 West 2nd Street
Little Rock, Arkansas 72201
(501) 324-9400

SAMPLE MEMO FROM THE COMPANY

INTEROFFICE MEMO

TO: ALL EMPLOYEES
FROM: Joanne Doe, Plant Manager
DATE:

Looking around ____________ today we see lots of changes. Computers are showing up everywhere. Work is more complex. We are looking at new concepts like "Quality." We're trying hard to be more productive, more cost efficient, and to reach higher levels of customer satisfaction.

Our goal is to be competitive. To do that, each of us must work and contribute to the best of our ability. Each of us has to be willing to learn new things, improve skills we may not have used in a while, and become "lifelong learners."

The enclosed survey will help me find out if employees are interested in having the company offer new education programs. Please take a few minutes to complete the survey and return it to me by ________________. If enough interest is there, I hope to sponsor "lifelong learning" classes on site for any interested employees. Work in any class we offer will be confidential.

After the surveys are returned and studied, we will meet with employees to talk about the results.

I'm excited about this opportunity to bring education programs to interested employees. Thank you for helping us better serve your educational needs.

SAMPLE #1: INTEREST SURVEY

Are you interested in becoming a "lifelong learner?" Do you want to improve your education by attending classes sponsored by ______________? If so, please complete this survey and return it to ______________ by ____________.

I. GENERAL INTEREST

Are you interested in attending company-sponsored classes to increase your education?

___ Yes, I am interested.
___ No, I am not interested.
___ I would like more information before I decide.

II. AREA OF INTEREST

Please check your area(s) of interest. I am interested in classes in:

___ Basic Reading and Comprehension Skills
___ Basic Math
___ Calculator Skills
___ Writing and Spelling Skills
___ GED preparation
___ Technical Language/Terminology
___ Memo and Letter Writing
___ Advanced English
___ Upper-level Math
    ___ Algebra
    ___ Geometry
    ___ Metric Conversion
___ other (please list): ______________________________

III. OPTIONAL INFORMATION

___ I have a high school diploma or GED
___ I do not have a high school diploma
___ Last grade completed

Name ________________________________

Department ________________________________

SAMPLE #2: INTEREST SURVEY

Are you interested in being a "lifelong learner?" Would you like to brush up on or improve your skills? Do you want to improve your education by attending classes sponsored by ______________. Please help us plan our education programs by **returning this survey to Personnel by** ________.

I. GENERAL INTEREST

Are you interested in attending confidential, company-sponsored classes to increase your education?

__ Yes, I am interested.

__ No, I am not interested.

__ I'd like more information before I decide.

II. AREA OF INTEREST

Please check your area(s) of interest. I would like to:

__ improve reading and comprehension skills.

__ improve math skills.

__ improve writing and spelling skills.

__ complete my high school education by getting a GED certificate.

__ improve skills in ______________________________
(i.e. work-related subjects such as graph and chart reading, the metric system, understanding insurance brochures, improving memo writing or other area of interest or need.)

Name ____________________

Department ____________________

Please return to the ________ *Office by* ________.

SAMPLE #3: INTEREST SURVEY

"Drop In" Lifelong Learning Session Topics

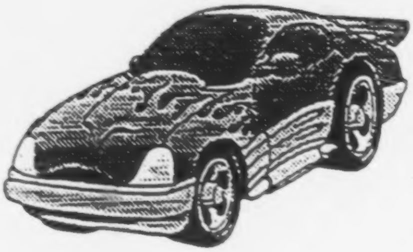
Many "drop-in" topics are available to area employees. The list is not exhaustive. Classes can be formal or informal. Depending upon the topic, sessions are available through the ______________________ Or ____________________.

FAMILY/LIFE SKILLS:

- __ balancing a check book
- __ understanding banking
- __ understanding insurance forms
- __ voter registration
- __ nutrition
- __ creative writing
- __ literature appreciation
- __ balancing work and family
- __ getting a library card
- __ using the public library
- __ families and schools
- __ reading sales advertisements in the newspaper
- __ television rules for children (limiting TV time)
- __ helping children with homework
- __ reading the newspaper
- __ disciplining children
- __ negotiating to resolve conflicts
- __ wellness
- __ ______________________

WORK/LIFE SKILLS:

- __ communication skills - listening
- __ communication skills - speaking
- __ work related writing
- __ work related vocabulary and spelling
- __ charts and graphs
- __ motivation and goal setting
- __ self-esteem
- __ study skills development
- __ team building
- __ problem solving
- __ critical thinking
- __ creative thinking
- __ ______________________



Drive yourself to success!

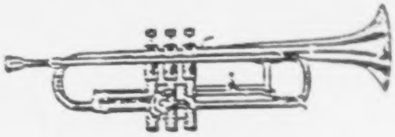
Join Company X's

Skills Refresher & GED Program

Every Monday & Wednesday
3:30 - 5:30 p.m.
in the Industrial Park
Classes begin April 15

Classes are FREE for all employees.
All work is CONFIDENTIAL.

See John Doe for Details



Announcing:

RDP's "Skills for Today"

A *FREE* class for RDP employees
who want to:

- read better (memos, recipes, instructions, newspapers)
- spell and write better (memos, letters)
- use math at home and on the job (mixing solutions, changing recipes, balancing a checkbook)
- study for the GED
- learn other life skills.

When: Tuesday and Thursday, 2-4 PM (starts 2/29)
Where: Pritchard Hall, 4th Floor Lounge
Cost: None - it's free to RDP employees

To enroll: talk with your supervisor or
call Bill Jones (555-4281)

Classes for Citizenship

These Classes Are For You If:

1. You have been a permanent resident for 5 years (3 year if you are married to a U.S. citizen)
2. You are 18 years or older
3. You want to become a U.S. citizen
4. You need help to pass the citizenship test

When:	Saturdays, May 11, 18, 25, and June 1, 1996 10:00 a.m. - 12:00 noon
Where:	The Jefferson Center (Roanoke City Schools Office of Adult Education) 541 Luck Ave. S.W. Suite 330C Roanoke, Virginia (See map on back)
Cost:	$25.00 for 4 classes (8 hours total) Study Guide Included
To Register:	Call Alice Duehl at the Refugge and Immigration Services Office. Phone Number (540)555-7561 Call Now!

Next Citizenship Test is June 8th

WORKPLACE BASICS - WHY BASIC SKILLS?

In today's highly competitive economy, employers depend more than ever on front line workers. Whereas in the past employees needed only to follow directions, today they must be skillful at:

reading and writing
math
communication
critical thinking
problem solving

Basic skills are not only important in their own right. Success at other education and training programs depends on a solid foundation of basic skills.

While educational attainment does not always predict who does or does not have these skills, it does paint a picture of the workforce. The 1990 U.S. Census provides the following educational snap shot of persons over the age of 25 in the region.

	Venus	Mars	Saturn	Neptune	Pluto	Total
% with less than 9th grade	25%	18%	13%	20%	12%	17%
% with 9-12 grade; no diploma	14%	18%	13%	20%	13%	16%
% NOT high school graduates	40%	36%	26%	40%	25%	32%

The Adult Education Office offers basic skills courses customized to the need of the individual workplace. Examples of programs available to employers are listed on the attached page.

For additional information about customized basic skills programs, contact:

Janet Planet
Adult Education Program
555-2167

Do You Want Free Help?

With Your Reading or Math
In Order to Improve Your Job Skills
And Your Quality of Life?

Or

Do You Want to Get Your GED?

If You Do, Call

____

at

____

Your Call Will Be Treated
In Confidence and With Care.

Quiers Ayuda Gratis

Con Tu lectura o matema'tica para poder mejorar tus habilidades en el trabajo y lo calidad de vida?

O

Quieres obtener tu G.E.D. (Diploma de equivalencia general)?

Si tu quires, Llama a

____

Al tele'fono

____

Tu llamada sera' tratada en
confidencia y con cuidado.

SAMPLE INTRODUCTORY COMMENTS TO POTENTIAL WORKPLACE STUDENTS

I. INTRODUCTION AND WELCOME BY MANAGEMENT.

[Suggestion: "We are really pleased to be starting this program. We see it as an opportunity for everyone to benefit: the company and individual employees. We hope it will begin to prepare you for the changes which are coming to the workplace as we get more complex, introduce computers and ...... We recognize that the workplace is changing and we want to be sure that each employee has the skills needed to change with in. In addition, we hope that what you learn in class will have positive effects on your life outside of work.

Please understand that there are no negative ulterior motives. No jobs are in jeopardy. All work will be kept confidential. We hope you will take advantage of the opportunity to brush up on your skills. We will be proud of anyone who participates and does their best."]

II. WELCOME INTRODUCTION OF TEACHER AND AIDE OR ADMINISTRATOR, OR WHOEVER IS PRESENT.

III. COMMENTS BY TEACHER OR ADMINISTRATOR:

Thanks to company for providing this opportunity. I look forward to working together with participants and having a great time while learning.

"Today I want to talk to you about three things:

A. PROMISES

1. I **promise** that this class will be different from any other you have ever been in. Participants can chew gum, drink coffee, talk and, most of all, have a good time. In addition to items set up in the program design, the class will set the ground rules for the class.
2. I **promise** that everything that happens in this class will be confidential and will be kept between you and ________ (teachers names). The company is sponsoring this class to help you develop your skills - they are not interested in anyone's test scores or individual work, only that everyone does the best he or she can.
3. I **promise** that you will not be competing with anyone. The progress you make will be compared to where you are today; not where everyone else ends up tomorrow. Much of what we do in class will be in teams so that you can learn from each other and teach each other and learn to depend on each other just as you do on the job.

B. CHALLENGES

1. I **challenge** you to take an active part in your education - to become a "lifelong learner" who recognizes that your education never ends but should continue each day of your life. The workplace is getting more complex and each of us has a responsibility to keep on learning so that we can be the best employee possible.
2. I **challenge** you to help your teacher understand your work and your life so that this class will be relevant to both. Take the teacher on a plant tour; tell him/her what your job is and what you feel you need to know to do it better.
3. I **challenge** you to help others be as brave as you are by inviting them to join us here.
4. I **challenge** you to take advantage of this wonderful opportunity and to try your hardest and do your best. The company is investing in your future - so should you.

C. RESPONSIBILITIES

1. This company is investing a great deal of time and money in providing classes for its employees. It is the responsibility of **each of us** not to let them down. **We are responsible** for providing the best classes we can; **you are responsible** for taking advantage of them. They are footing the bill - let's do them proud.
2. You are **responsible** for giving this your best shot.
   a. The GED test is hard (if that's the goal of the class). [For GED classes: In fact, it's estimated that 30% of last year's high school graduates couldn't pass it. Many of you may not be ready to take the GED after this class; but take the responsibility for progressing as far as you can while the classes are going. OR
   b. Going back to school is hard - for a lot of people, it's been years since they were in a classroom. But in all the workplace classes companies in the area have sponsored (this will be the ____), not one employee has ever told us that s/he didn't learn, didn't have things come back faster than they thought they would, or didn't improve their self-confidence by being involved.
3. You are **responsible** for helping the company to see how much you appreciate their investment in you so that other employees at other companies will have similar opportunities.

IV. SIGN UP PERIOD

A. As the Action Plan indicates, tell them about the sign up period (usually one week) and tell them starting and stopping dates of class.

V. THANKS AND ENJOY THE CLASS!

ASSESSMENT TOOLS (ABBREVIATED SUMMARY)

TEST	TYPE	LEVEL	TIME	ADDRESS	PHONE/FAX
READ	Individual	0 - 5.5	30 minutes	Literacy Volunteers of America, Inc 5795 Widewaters parkway Syracuse, NY 13214	P: 800-582-8812 F: 315-445-8006
SORT	Individual	0 - 10.0+	5 minutes	Wide Range, Inc. (JASTAK) PO Box 3410 Wilmington, DE 19804	P: 800-221-9728 F: 302-652-1644
TABE	Individual/Group	2.6 - 12.9	2 hours 45 min	CTB/McGraw Hill 209 Ryan Range Road Monterey, CA 93940	P: 800-538-9547 F: 800-282-0266
TALS	Individual/Group	Based on performance level	2 hours (40 minutes per test)	Simon & Schuster Workplace Resources PO Box 1230 Westwood, NJ 07675	P: 800-223-2348 to open account P: 800-223-2336 subsequent orders F: 800-445-6991
WRAT	Individual/Group	Math N.1 - 11.9	45 minutes	Wide Range, Inc. (JASTAK) PO Box 3410 Wilmington, DE 19804	P: 800-221-9728 F: 302-652-1644
		Reading N.7 - 13.7	15 minutes		
CAPS	Individual/Group	7.0 - 13.0 +	51 minutes	Edits PO Box 7234 San Diego, CA 92167	P: 619-222-1666 F: 619-226-1666
COPS	Individual/Group	7.0 - 13.0+	30 minutes		

ADULT EDUCATION INFORMATION SHEET
GENERAL PLACEMENT AT ENROLLMENT

A (Level 1: 0-4th)	B (Level II: 5th-8th)	C (Level III: 9th - 12th)
#1 = 1.0	#1 = 5.0	#1 = 9.0
#2 - 1.5	#2 = 5.2	#2 = 10.0
#3 = 2.0	#3 = 5.4	#3 = 11.0
#4 = 2.5	#4 = 5.6	#4 = 12.0
#6 = 3.5	#5 = 5.8	
#7 = 4.0	#6 = 6.0	
	#7 = 6.2	
	#8 = 6.4	
	#9 = 6.6	
	#10 = 6.8	
	#11 = 7.0	
	#12 = 7.3	
	#13 = 7.5	
	#14 = 7.7	
	#15 = 8.0	
	#16 = 8.3	
	#17 = 8.5	

LOCAL GUIDELINES

- Score only what the learner does totally independently.
- Do not count spelling errors or other writing mechanics. This sheet is designed to assess general functional READING ability, not other skills. If you notice writing skills need improvement, you can ask the learner if s/he wants to work on spelling, writing, etc. (For Goal Setting) but do not count this in the scoring.
- Find the place where the learner begins to have trouble answering (consecutive incorrect answers, blank answers, etc.)
- Use your best judgement from the INFORMATION SHEET results, along with the scoring chart above to arrive at your "Best Assessment' of current reading ability. This is your general placement at enrolment, a guideline for getting the learner started, offering choices of materials, etc.
- Within 12 hours administer appropriate "formal testing to determine "READING LEVEL AT ENROLLMENT" (SCANTRON). NOTE: If unable to administer formal testing by end of year, the General Placement at Enrollment score may be used for Reading Levels on SCANTRON.

This is an informal gross placement test which has been adapted from Extension Teaching & Field Service Bureau, Division of Extension, The University of Texas at Austin. Permission to reproduce granted to Adult Education Programs. (Scoring guidelines developed by Judith Davis, PD17.)

ADULT EDUCATION INFORMATION SHEET
INFORMATION SHEET

1. Write or print your name ____________
2. What is your address? ____________
3. What is the date today? ____________
4. Do you have a telephone? _____ What is the number? ____________
5. Are you married? _____ What is your husband's (or wife's) name? ____________
6. When is your birthday? ____________
7. Where were you born? ____________

STOP

B. 1. Are you a citizen of the United States? ____________

2. Are you a citizen by birth or by naturalization? ____________
3. Do you maintain private transportation? ____________
4. If so, what type? ____________
5. Do you possess a valid driver's license? ____________
6. What type of books would you like to read? ____________
7. Are you a registered voter in the state of VA? ____________
8. If you are presently employed, please indicate whether or not you are employed on a full-time or a part-time basis. ____________
9. How long have you worked for your present employer on the job which you now hold? ____________
10. Do you subscribe to a newspaper? ____________
11. Do you subscribe to any magazines? ____________
12. If so, please list them. ____________
13. Do you own (or have ready access to) a T.V.? ____________
14. Do you own a radio or is one available to you? ____________

15. Please answer either fine, good, fair, poor, or bad to the following questions:

a. How is your vision? ______
b. How is your hearing? ______
c. How is your general health? ______

16. Please write in words the number of times you estimate that you visit your doctor each year. ______

17. How did you learn about this program? ______

STOP

C. 1. Please write a brief and pertinent paragraph explaining how you were made aware of this program.

______

______

______

2. Please write a paragraph telling the aspirations which you have that you feel can be enhanced or furthered by the program which you are now beginning.

______

______

______

3. Please write a paragraph about yourself, as you see yourself. You may reiterate the information which you have already given in the above paragraph.

______

______

______

4. Give me that information which you feel will be most helping in aiding an instructor who is trying to prepare a program of instruction suited to your particular needs.

______

______

3 - 15 (2 pages)

COMPANY XXX TRAINING SURVEY

Adapted for the Workplace from the Adult Education Information Form

SECTION A:

1. Write or print your name. ____________________

2. What is your job title? ____________________

3. What shift do you work? ____________________

4. What year were you hired? ____________________

SECTION B:

1. Are you employed on a full-time or a part-time basis? ____________________

2. Have you always worked the shift you are now on? ____________________

3. What was your first job with Company X? ____________________

4. How long have you worked the job you have now? ____________________

5. Has your training been enough for the job you have now? ____________________

6. How much total training have you received?
(Answer in days or hours, whichever fits best.) ____________________

7. Write in words the number of meetings have you had with your supervisor since the first of the year?
____

9. Please answer with either good, fair, or bad the following questions:
   a. How is your vision? ____________________
   b. How is your hearing? ____________________
   c. How is your general health? ____________________

10. Are you a high school graduate? ____________________

11. Are you a GED recipient? ____________________

12. If Company X offered a basic skills refresher class on site,
would you enroll? ____________________

13. If Company X offered a GED class on site, would you enroll? ____________________

SECTION C:

1. Please write a brief paragraph explaining the importance of observing safety regulations while working on the Company X site.

2. Please write a paragraph outlining in detail the training you have received, both formal and informal, which gave you the expertise to carry out the duties of your current position.

WORKSITE INFORMATION FORM

Last Name	First Name	Middle Initial	Maiden Name
Address		County	Zip Code
Home Phone	Social Security #		Date of Birth

Number of Children ______________ Number of Children in School ____________________

Company Name ____

Job Title	Years With This Company	Shift

Highest grade completed in regular school ________________________________

Have you taken adult courses before? Yes ___ No ___

If so, where and when ____

Notes:

TECHNICAL SKILLS INTEREST SURVEY

Please help us plan a technical skills improvement program.

AREA OF INTEREST

Please check your area(s) of interest.

____ Improve technical reading and comprehension skills

____ Improve technical math skills

____ Improve writing and spelling skills

____ Complete my high school education by getting a GED certificate

____ Improve other skills (for example: graph and chart reading, the metric system, memo writing etc)

____ I need more information (If you check this space, please give us your name so we can get information for you.

Thanks for your help. Please return this survey to ______________ by ____________________.

SAMPLE WORKPLACE INTERVIEW

1. We are here to talk to each employee and tell them a little about what we do and why we are here.

2. The company has allowed us to come in and talk with each employee to help identify training needs. I want you to know that what we say is between you and me and no one else.

3. Let me explain a little bit about the program and please make suggestions are we go along. I need your help to make this the best experience it can be.

4. This worksite program is going to cover math, reading, writing and other skills to bring the workforce to the "same page." You might be interested in some skill areas we have talked about, or possibly some others.

5. In these adult classes, everybody works at their own speed and the instructor works separately with each student. Would this be okay with you? OR
   In these adult classes, everybody works in teams to mirror they way this workplace functions. Would this be okay with you? Would you like me to explain more about how this works?

6. As we are talking, may I make some notes on the bottom of your information sheet to help me? Again, I want to tell you that these are for my use in planning a program that does the best possible job for everyone.

7. The class usually meets one or two days each week for about two hours, but we are still working out details. Comments.

8. What would be the best time for you to attend class? Is there any day that is not as good as others? We cannot promise a particular day or hour, but we'll try to take your wishes into consideration.

9. Do you have time and a place at home where you can practice and study?

10. What training have you had here at the plant? At other places you have worked?

11. Are there any other personal goals or things that you would like to learn more about? (Helping children with homework? Preparing for certification as a fire fighter or EMT?

SPECIAL EMPHASIS NOTES TO ACCOMPANY THE WORKPLACE INTERVIEW

I. **Confidentiality is always the rule.**
Be sure to stress confidentiality with the employees and employer. Learners do not like to be discussed with their supervisors just as companies do not like to be discussed with other companies.

II. **Learn the corporate culture**

A. Read the company newsletter
B. Read the bulletin boards
C. Participate in their training functions when appropriate (Always get permission.)
D. Know who receives company awards and acknowledge it in class
E. Learn the "politically correct" language
F. Use the language of the company
G. Ask appropriate questions
H. Let your learners help you (by describing their jobs, how they do them etc)
I. Listen and talk with the company's learners

III. **Be a resource person**
Learners often have questions about the local school system, the community college, community resources etc. Know the answers or find them out and report back so learners can be referred to other agencies or people for further assistance.

IV. **Be knowledgeable about our global society and its impact**
This has much to do with the onslaught of quality improvement measures and ISO 9000 certification procedures and measures.

V. **Name the program**
Employers and/or employees can name the program to give it identify and personal ownership. The program can be referred to as a "workforce education" program at all vital meetings.

INFORMATION SHEET INTERPRETATION
EXTENSION TEACHING & FIELD SERVICE

This is an informal gross placement test which has been adapted for use in the workplace. It was originally developed by Extension Teaching & Field Service Bureau, Division of Extension, The University of Texas at Austin. Permission to reproduce granted to Adult Education Programs.

This survey provides employers with a "snap shot" of employee skill level. As it is written as a survey on training for the company, it also provides information on the company training program. It should be administered in groups. If employees need to ask questions in order to complete the survey, give enough information to enable them to answer, but make a note of the questions on the returned survey. This will assist the interpreters in knowing how much the employee was able to comprehend on his/her own.

Those who can fill out the first section only read below the fourth grade level (Level I).

Adequate completion of the second section indicates those that read and write between the fourth and eighth grade levels (Level II)

Adequate completion of the third section indicates those that read and write above the eighth grade level (Level III/GED Prep)

Questions may be changed and adapted provided the level of difficulty remains the same.

Note: See Chapter 7: Instruction for more detailed information on scoring the Information Sheet

3 - 20 (2 pages)

[CUSTOMIZE FOR COMPANY] TRAINING SURVEY

SECTION A:

1. Write or print your name. ____________________

2. What is your job title? ____________________

3. What shift do you work? ____________________

4. What year were you hired? ____________________

SECTION B:

1. Are you employed on a full-time or a part-time basis? ____________________

2. Have you always worked the shift you are now on? ____________________

3. What was your first job with Company X? ____________________

4. How long have you worked the job you have now? ____________________

5. Has your training been enough for the job you have now? ____________________

6. How much total training have you received?
(Answer in days or hours, whichever fits best.) ____________________

7. Write in words the number of meetings have you had with your supervisor since the first of the year? ____________________

9. Please answer with either good, fair, or bad the following questions:

    a. How is your vision? ____________________

    b. How is your hearing? ____________________

    c. How is your general health? ____________________

10. Are you a high school graduate? ____________________

11. Are you a GED recipient? ____________________

12. If Company X offered a basic skills refresher class on site, would you enroll? ____________________

13. If Company X offered a GED class on site, would you enroll? ________________

SECTION C:

1. Please write a brief paragraph explaining the importance of observing safety regulations while working on the Company X site.

2. Please write a paragraph outlining in detail the training you have received, both formal and informal, which gave you the expertise to carry out the duties of your current position.

4 - 1

SAMPLE BUDGET WORKSHEET

Name of Company: ______________ Contact: ______________

Address: ______________ Phone: ______________

Anticipated Starting Date: __________

Type of Program:

__ ABE
__ GED
__ ABE/GED
__ Literacy

__ ABE/GED using workplace materials
__ Job Specific
__ Critical Thinking/Problem Solving
__ Customized ______________
__ Other

Program Length: ___ weeks x ___ days per week x ___ hours per day = _______ total hrs

---

Teacher Salary: _____ total hours x _____ hourly rate (FICA __yes __no) = $ _______

Teacher Prep: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Teacher Staff Devel: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Recruiting: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Testing: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Aide Salary: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Aide Prep: _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Aide Staff Develop. _____ total hours x _____ hourly rate (FICA __yes __no) = _______

Books/Supplies: $ _____ x _____ (# employees) = _______

GED Test Fee: $ 25 x _____ # employees = _______

Sub Total $ _______

Administrative Fee (__%) _______

Actual Total: $ _______

TOTAL ESTIMATE: $ _______

Prepared by: ______________ Date: ______________

Mailed: ______________ CC: ______________

1995/96 TEACHER/AIDE PAY CHART

JURISDICTION	TEACHER	FICA	TOTAL	AIDE	FICA	TOTAL
Mars	16.00	1.22	17.22	10.00	.77	10.77
Venus	15.64	1.20	16.84	8.45	.65	9.10

4 - 2 (2 pages)

SAMPLE CONSULTANT AGREEMENT

Date ___________

Dear :

This letter contains the terms and conditions pursuant to which _____ ("CONSULTANT") will provide certain services for ________ (Name of Company/"NOC"). CONSULTANT and NOC hereby agree as follows:

I. DESCRIPTION OF SERVICES AND OWNERSHIP OF PRODUCT

It is understood that the need for an Adult Literacy program ("ALP") exists at NOC. Subject to the terms and conditions of this agreement, CONSULTANT hereby agreed to perform the following services (The "Services") for NOC. CONSULTANT agrees to develop, implement and coordinate an ALP working in conjunction with the Personnel Department at NOC. CONSULTANT will be responsible for the following:

A. Assess all participating employees using testing protocols approved by the Virginia Department of Adult Education and job specific academic assessment tools developed for NOC to determine initial basic reading and math skill levels and academic job readiness.

B. Design and produce advertising programs as needed to promote the ALP and other training programs.

C. Maintain a lending library containing useful materials for self-help and job enhancement.

D. Perform readability studies on any pertinent written material used at NOC to determine the level of reading difficulty.

E. Develop plant specific technical training manuals, on a sixth-to-eighth grade reading level, on an as needed basis, in conjunction with the Personnel Department.

F. Be available for and conduct and/or supervise instruction for the ALP at NOC Monday through Friday during times mutually agreeable to both parties.

G. Submit monthly attendance reports to the Human Resource Manager.

H. Devote a minimum of twelve (12) hours each week to curriculum development, development of a lending library, public relations, an acquisition of guest speakers.

I. Coordinate the acquisition, orientation, and supervision of additional instructional staff, as needed, in conjunction with the Personnel Department.

J. Procure instructional materials, including computer software, pertinent to the ALP and training programs, in conjunction with the Personnel Department.

K. Participate in development and delivery of training programs for hourly and salaried employees in conjunction with the Personnel Department.

II. RELATIONSHIP OF PARTIES

It is expressly understood and agreed that CONSULTANT is an independent contractor with respect to Services. NOC is interested only in the results to be achieved, and the conduct and control of the Services will lie solely with the CONSULTANT. The CONSULTANT and her employees are not to be considered as agents or employees of NOC for any purpose, and the consultant and her employees are not entitled to any of the benefits that NOC provides to NOC employees. NOC recognizes that CONSULTANT may perform Services as an independent contractor for other companies and does not perform Services exclusively for NOC.

III. COMPENSATION AND HOURS

CONSULTANT shall schedule her own hours and days during which she will perform the Services and NOC will rely upon CONSULTANT to schedule her hours as is reasonably necessary to fulfill the spirit and purpose of this agreement. NOC does not guarantee any minimum number of work days or hours during which CONSULTANT will perform the Services. NOC and CONSULTANT agree, however, that CONSULTANT shall perform Services at a maximum of forty (40) hours per week at a rate of _____ Per hour. This fee shall be the total compensation for the Services. NOC shall not withhold any employment-related local, state or federal taxes or other withholdings and it shall be the CONSULTANT's sole responsibility to pay all taxes and other withholdings on behalf of herself and her employees. CONSULTANT shall invoice NOC on a weekly basis and shall, upon request, substantiate each such invoice. NOC shall pay such invoices within thirty (30) days of receipt.

IV. TERMINATION

A. This agreement shall commence on _____ And shall terminate no later than _____ Unless earlier terminated in accordance with this agreement.

B. Either party may terminate this agreement, in whole or in part, with or without cause, upon written notice to the other party, thirty (30) days prior to the date of termination. Upon any termination of this agreement by NOC

SAMPLE INSTRUCTOR LETTER OF AGREEMENT

Adapted from Richmond Public Schools, Adult Career Development Center

Date: ______________

I, ______________________, understand that this appointment is contingent upon the ______________________ Adult Education Program (AEP) receiving sufficient funds to pay for this position. I will be appointed as a staff member of AEP for __________ (semester) ______ (year). I will report for this assignment on ______________. I recognize that this agreement extends through ________________.

I also understand that time sheets and attendance records required by the AEP office are to be completed and submitted by the dates requested.

In the event of my absence, I agree to call the AEP to arrange for a substitute.

I will attempt to attend AEP staff meetings and staff development sessions offered through AEP. I will also attend professional development conferences and workshops when possible. I understand that I will not be paid for these professional development activities unless pay is specifically approved for the activity by AEP Administration, I further understand that part-time employees are not paid for time off (holidays, personal business, etc.)

I accept this assignment under the conditions stated above. I recognize that this assignment is on a part-time basis. I also understand that this part-time employment should not be interpreted as a pre-condition to a contract.

________________________________ Signature

________________________________ Date

SAMPLE WORKPLACE EDUCATION AGREEMENT BETWEEN THE ADULT EDUCATION PROGRAM (AEP) AND THE WORKPLACE INSTITUTION

Adapted from Richmond Public Schools Adult Career Development Center

AGREEMENT SUMMARY

Date: ____________________

The Adult Education Program and _______________ agree to establish a cooperative Workplace Education Program for employees of the workplace institution. This program will be held at the workplace institution's location. This agreement will be in effect from _____________________ to __________________.

The workplace institution agrees to:

1. Recruit employees to the program.
2. Fund the program. The amount is projected to be ____________.
3. Develop a calendar at the beginning of each session.
4. Develop program goals cooperatively with AEP.

The Adult Education Program agrees to:

1. Employ and train instructors for the program.
2. Handle payroll for personnel in the program.
3. Maintain attendance records on employees enrolled.
4. Bill the workplace on a quarterly basis for reimbursement of expenses incurred.
5. Develop program goals cooperatively with the workplace institution.

Either party has the right to terminate this agreement at the end of a session with 60 days written notice.

Signed _________________________ Administrator AEP	Signed ____________________________ Workplace CEO
Date _________________________	Date ____________________________

The Workplace Institution Agrees to:

1. **Recruit employees to the program.**
   The company will recruit employees to the program.

2. **Fund the program.**
   The amount of funding for the program will be determined for the AEP fiscal year. A budget for the fiscal year (July 1-June 30) will be developed by the AEP and the workplace agency, and shared with AEP Finance Department. Increases in the budget will require a written letter from the agency with the stated incremental amount. AEP will revise the initial budget which will be submitted to the AEP Finance Department. A copy of the revised budget will go to the agency. This process will be continuous.

   Funding will be for the following sessions:

July 1 to August 30	(Summer)
September 1 to December 30	(Fall)
January 1 to June 30	(Winter/Spring)

3. **Provide an up-front amount.**
   The up-front amount will not exceed $_________.

4. **Develop a calendar at the beginning of each session.**
   The calendar will be developed at the beginning of each session consistent with the workplace institution work schedule and other anticipated needs. Special circumstances with the workplace agency may necessitate deviation from the calendar. Such circumstances will be documented and agreed upon by both parties and such circumstances will be communicated with as much advanced notice as possible.

The Adult Education Program Agrees to:

1. **Employ and train instructors in the program.**
   All employees will complete an agreement form at the beginning of each semester and complete all AEP forms. Staff meetings will be held at the beginning of each semester. A calendar of staff meetings will be distributed to staff. The AEP Teacher Evaluation form will be used to evaluate staff., AEP policies will be shared on an on-going basis. Staff will be invited to the AEP staff development sessions as indicated in the AEP calendar. Individual Learning Plan sessions will be conduced by the AEP staff. Additional staff training will occur at the agency location as the need arises.

2. **Handle payroll for personnel in the program.**
Teacher hours for staff will be determined collaboratively by AEP and the Agency. The maximum hours per week for teachers not on contract will be 35 hours. Special circumstances may create the need for teachers to occasionally work longer than the normal work schedule. Such circumstances will be communicated with as much advance notice as possible.

3. **Maintain attendance records on employees enrolled.**
Teachers will maintain a record of employee attendance. AEP will distribute pertinent record keeping materials. At the end of each semester, end-of-session forms will be completed.

4. **Bill the Workplace**
AEP will bill the workplace agency on a quarterly basis for reimbursement of expenses incurred. The workplace agency will be billed for the initial up-front amount during the last week of June. In order to maintain consistency with the workplace fiscal year, billing can be initiated by the workplace agnecy as it deems necessary. In addition, AEP agrees to provde the workplace agency with documentation from the AEP Finance Department of expenditures per pay period as well as for each quarter. The billing period for the first two quarters wll follow the actual semester calendar. The last session will be divided into two billing periods (January 1 o March 3 and April 1 to June 30).

5. **Evaluate the effectivenss of the program.**
Effectiveness of the program will be evaluated using multiple measures some of which will be: number of employees enrolled; attendance and attrition rates; number of GED's obtained; grade level gains; test scores and other performance indicators; and cost effectiveness of the program.

4 - 5 (2 pages)

REVIEWING AN RFP

THREE CRITICAL STEPS

1. DETERMINE ELIGIBILITY
2. DETERMINE FEASIBILITY/BENEFITS FOR YOUR ORGANIZATION
3. ANSWER CRITICAL DATA/QUESTIONS LISTED BELOW:

Proposal preparation meeting No ☐ Yes ☐

Date__________
Location______________________________

DUE DATE FOR PROPOSAL: ____________________

Contact person and number ______________________________

Total dollars to be awarded ______________________________

Estimated number of awards ______________________________

Estimated average size of awards ______________________________

Estimated range of award amounts ______________________________

Project period ______________________________

Start date for project ______________________________

YOUR BUDGET: __________ __________

Match budget required — No ☐ Yes ☐

Percent of match budget required ______

Match budget narrative
Required ☐ Optional ☐ Not allowed ☐

YOUR MATCH BUDGET: ____________________

Check against required percent – Sometimes this gets tricky with admin. dollar amts.

Administrative costs allowed — No ☐ Yes ☐

Cap on admin. costs ______ No ☐ Yes ☐

Break down ERE ________ No ☐ Yes ☐
(Fica, retirement, unemployment, medical, etc.)

Number of copies needed ______ Plus original with signature(s)

Number of pages allowed for narrative ______

Single-spaced ☐ Double-spaced ☐
One side ☐

Budget narrative
Required ☐ Optional ☐ Not allowed ☐

Assurances/certifications to be included – No ☐ Yes ☐

Note: Make list on separate page of assurances of certifications you are required to include

Attachments
Required ☐ Optional ☐ Not allowed ☐

Note: Make lists on separate page of required attachments and/or the attachments you want to include

Mail to State Single Point of Contact No ☐ Yes ☐

Private Industry Council No ☐ Yes ☐

Legislators No ☐ Yes ☐

Other No ☐ Yes ☐

Due Date ______________________

Name, address, phone

____

____

____

Mail or hand deliver to address below: (Note any special directions including how to mark envelope)

____

____

____

____

Additional Tips:

Highlight the critical data and answers to the questions listed above in the RFP. Also highlight the selection criteria; any required inclusions for the narrative; and the funder's priorities for funding including target population, type of program, need to collaborate, etc.

If the RFP you are reviewing is one that you responded to before, you need to get out your old RFP and compare it closely to the new RFP and highlight the things that are different so you will know what to change in your proposal.

Two critical questions:

Do you have or can you obtain a copy of the selection criteria reviewers will be using to score the proposal?

Will the funder provide a list of previous grantees, abstracts of funded projects and/or a copy of a successful proposal?

— 4 - 6 (3 pages)

TIPS ON GRANT WRITING —————————— by Susana Mincks

Published in *Professional Tips for Adult and Continuing Educators*, AAACE publication

Adult education professionals can benefit from building up their grant-writing skills. Many resources tell us of opportunities for funding, but with limited time to develop grants, it is important to target the opportunities with the greatest potential for success, and to develop the skills necessary to be successful in obtaining grants.

Once you start looking (the grants collection at your public or university library is a good place to start), you'll find a plethora of potential funding sources, from government entities to corporations and foundations. Foundations often use a process in which you submit a "letter of inquiry" to see if your project "fits" with what they want to fund, and then follow up with a full proposal if they encourage you to submit. The tips in this article relate mainly to another funding process, the opportunities which are expressed in Requests for Proposals (RFP's) with printed instructions and due dates.

TIP #1 Before you start to write a proposal, determine eligibility, and then the feasibility and benefits for your organization.

Determining whether or not your organization is eligible to apply to a particular funding source is a simple but critical step. It should always be your first step in reviewing an RFP so that you don't waste time pursuing funding for which you are not eligible. Usually eligibility is fairly clear, but if you're not sure, call the funding source and ask questions.

This same advice, *talking to the funding source*, goes double for questions that come up during the proposal writing process. *Do not hesitate* to clarify any unclear directions or information. As we often tell our students, "There are no dumb questions." Your confidence will grow and your writing will improve as the answers you receive lead you into a clearer picture of exactly what the funder *wants* to fund.

If your organization has a strategic planning process in place, you will be in a much better position to evaluate the potential benefits of grant opportunities. Strategic planning will give you concrete ideas for grant projects and an informed view of what your organization can and should attempt to do. Then you can look for funding that helps you reach the goals you've established. In determining feasibility, it's important to look at your project from the funder's point of view as well as your own. How closely does your project fit the purpose of the grant program stated in the application information? *Be honest*—if you have to stretch too far to make your project fit what the funder is looking for, it's probably not worth your time and effort to apply.

TIP #2 Review the application information carefully, and create a critical data page as an important reminder of dates and requirements.

In writing a proposal, there's often a lot of critical information to keep in mind. A combination of highlighting the application information and creating a special reminder page for critical data helps with organization. Highlight the selection criteria; any required inclusions for the narrative; and the funder's priorities including target population, type of program, and need to collaborate. Reread this information frequently throughout your writing process, so that you'll be sure to include the intent and the language of the application information in your proposal.

The reminder page you create should include the due date in large print (the most important information), contact person and phone number: start date and stipulated period for the project; whether a match budget is required (funding from your own or other sources to augment the proposal budget/demonstrate your commitment) and what percent of match is needed; whether administration costs are allowed and the allowable percent; whether you have to mail the proposal to any other entities besides the funder and what the due dates are for those mailings; how many copies you need to submit; the format and page limit requirements; a list of the assurances/certifications to be signed and included with the proposal; whether attachments can be included; and the address and mailing instructions.

TIP #3 **Start with the budget, because the budget drives the project.**

You won't know how many clients you can serve or how many hours of service you can provide or whatever outcome you want to produce without doing an analysis of your costs. First, decide on the appropriate time frame for your project. Then compute costs for each position (salary and employee-related expenses), the space you'll be needing, the materials and supplies, printing or copying, telephone, utilities, janitorial, any sub-contracting needed, staff development you might want as part of the program, travel, administrative costs for the oversight or accounting related to the project.

In many cases you'll have administrative or overhead costs (such as rent or utilities) or some other aspects of your proposed project already in place. If needed, these items can become part of your match budget, and if they do, then you're going to have to compute the costs just as carefully as you do for the proposal items. Even if you don't need a match budget, it is often beneficial to point out that your organization is making a substantial contribution to the proposed project by briefly listing the resources which will support it.

A great way to get the information you need for creating the proposal budget is to involve the people who will be carrying out the project. This has the dual advantage of lessening your load (ideally) and, more importantly, getting them to buy into the project, which will work to ensure its success if it's funded. Ask them what they think it will take to get the job done. How many hours of work? Who will do what? Will the project require additional staff? What will the job descriptions look like? Is more space required? Do you have enough chairs? The right computer program? These same questions also need to be asked of anyone you're collaborating or subcontracting with if you have an arrangement that includes sharing the grant funding with others.

TIP #4 **Always review your budget amount with a reality check and by comparing it to what's likely to be funded.**

Check your final budget figure for its real life value and the project's outcomes against the cost per outcome. X number of people, let's say, will have received Y number of hours of services. How will these people have benefitted? How much for each person? How much for each hour? Does this seem reasonable to you?

Another way to review your budget is to establish a range of dollar amounts that have a likelihood of being funded based on information provided by the funding source. Then check to see how the cost of your proposed project relates to the likely-to-be-funded amount. If your amount looks too high, you may be able to adjust your cost for a better chance at being funded. Let common sense be your guide in determining the right amount.

TIP #5 **Prepare proposal attachments along with writing the proposal.**

The application information will tell you whether or not attachments are allowed. Attachments may include letters of commitment from proposal partners, résumés of key staff, an organizational chart, etc. Because attachments go at the end of the proposal, we often put them at the end of our proposal writing process. At that time, we're often rushed, and the creative ideas we get for outstanding attachments sometimes aren't accomplished. You can potentially improve your attachments (and chances of success) by preparing them simultaneously with developing the rest of your proposal.

TIP #6 **Act like the funder to review your proposal before submitting it.**

Use the funder's criteria and point system, if available, for your review. Having someone outside of your organization do this would also be very helpful. You should also compare the points awarded for each section to the amount of space you've allocated to it in your proposal. For example, if the "Evaluation Section" is worth 25% of the total points, did you allocate an appropriate amount of the available space for that section?

Your final review should always include a check for any spelling, grammar, or syntax errors as well as an appraisal of the graphic appeal of the completed proposal. If the cover page isn't a stipulated form, make your own creative cover page stand out by using borders, bold, italics, varied fonts and sizes. Look at each page to make sure your method for handling headings is consistent, your borders are ample, and the overall format is appealing. Make any changes indicated in your review process and mail or deliver your proposal on time. Good luck!

◆ ◆ ◆

Resources for Additional Information

An accomplished grantwriter who will serve as a mentor to you as you develop your skills is one of the most valuable resources you could have. I credit Greg Hart, Director of Pima County Adult Education, for providing me with invaluable mentoring assistance. Additionally, our agency's subscription to *Education Grants Alert* (Weekly newsletter published by Capitol Publications Inc., P.O. Box 1453, Alexandria, VA 22313-2053) has been of great benefit, both in locating sources for funds, and in further developing my grant- writing skills.

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4 - 7 (2 pages)

MAKE YOUR PROPOSAL NARRATIVE REVIEWER - FRIENDLY

Funding Today

By Jacqueline Ferguson

Reprinted with permission from *Education Grants Alert*, Capitol Publications Inc., P.O. Box 1453, Alexandria, VA. 22313-2053 (703) 683-4100. [May 28. 1991 issue]

By Jacqueline Ferguson

Question: *Many funders are limiting the grant application narrative to 25 or 30 pages, as well as restricting the length of the appendix. At the same time, more selection criteria are being included and additional forms must be completed by the applicant. How can we present all the required information with such page limitations?*

Answer: It's a mixed blessing that many funders are limiting the length of grant applications. This change is because of the difficulty reviewers have in reading lengthy proposals in a limited amount of time. Also, ny applicants provide information that isn't essential to the proposal.

Of course, it's more difficult to write concisely within page limitations than to write without regard for length. As a general rule, grant applications should be submitted on standard 8½" x 11" white paper, double-spaced, printed on one side without print reduction, and with one-inch margins.

A project abstract, forms required by the funder, and the appendix are not counted as narrative pages. Letters of support, résumés, footnotes, etc., usually are included in the appendix. All pages of the narrative should be numbered sequentially with the first page of the narrative as page one.

Successful grant-writers often use the following tips in preparing a concise grant proposal that meets the funder's requirements.

✓ Adhere strictly to the application instructions. Some funders may disqualify applications that deviate from guidelines.

✓ Write the narrative to correspond to the selection criteria reviewers will use to evaluate and score the proposals. You will help reviewers judge your application by presenting sequentially the items they must evaluate so they don't have to hunt for them.

✓ Make it easy for reviewers to read your proposal. Write short, simple sentences and paragraphs. Provide sufficient margins and white space to make it easy to read each page. Edit the narrative to provide transition sentences, eliminate redundancy and omit editorializing. Never reduce the size of the type. Write clearly and concisely.

✓ Use headings and subheadings to guide the reader through the narrative. Headings should correspond to the funder's selection criteria.

✓ Use boldface and bulleting to emphasize key points.

✓ Write a topic sentence for each paragraph. These will help the flow of the narrative.

✓ Explain at the beginning of the narrative how your project meets the grant program's goal. This can be accomplished by placing your project's goal statement next to the statement of the grant program's purpose.

✓ Place references, footnotes and bibliography in the appendix for a cleaner, easier-to-read narrative.

✓ Include curriculum vitae no longer than two pages for each key staff member on the project, and place them in the appendix.

✓ Use the language of the grant program or legislation throughout the proposal. For example, use the key words in the project goal statement, such as target population, methodology, etc.

✓ Skip the standard letters of support. Everyone has them, particularly letters from senators and

(more)

representatives. Instead, include only letters of collaboration and commitment that specify the involvement and resources collaborators will bring to the project.

If you have more letters than you can include, list collaborators and explain their involvement in the narrative. Add as many letters to the appendix as space allows and state that you have other letters on file. You might even add a page or two that provides excerpted quotes from the letters to give reviewers a feel for the level of involvement and support you have received from collaborators.

Visual Aids

Besides writing concisely, you can use graphs, charts and tables to present information compactly. Visual displays can break up the prose and make the narrative easier to read.. Here are some sections of the narrative that can be summarized in graphic form:

- Summary chart of project goal, objectives and activities;
- Chart of activities, timeline, resources and staff responsibilities;
- Organizational chart including key personnel and management structure;
- Table that shows staff members' responsibilities and the percent of time each will spend on the project, including titles, names and days assigned to project;
- Qualifications and duties of key personnel summarized in two paragraphs per position;
- Collaborating agencies listed in a table that includes the name of the agency, contact person, title and contribution to the project;
- Budget explanation that includes the purpose of each line item; and
- A list of evaluation instruments in the appendix.

As you include graphs and charts, be sure to summarize in the narrative the main points that you want reviewers to draw from them.

No Frills

Make your proposal easy for reviewers to read and handle. Tell them directly what you are proposing and why. Provide statistical and research support for your statements. The narrative should be logical and flow well.

Also, stick to the funder's instructions on presentation, which usually prohibit covers, binders, tabs or a lot of attachments. Keep it a "no frills" proposal.

Finally, remember throughout the proposal development process that how you tell the funder about your project is as important as what you are proposing.

Provide reviewers with an easy-to-digest document that they can read easily... and score highly!

4 - 8 (2 pages)

PROPOSAL-WRITING BY THE NUMBERS: ED'S GRANT SCORING SYSTEM

Reprinted with permission from *Education Grants Alert*, Capitol Publications Inc., P.O. Box 1453, Alexandria, VA. 2313-2053 (703) 683-4100. [May 28, 1991 issue]

Grantseekers who fare best at the Education Department are the ones who understand ED's criteria for awarding grants and write their proposals accordingly.

To select projects for funding, ED reviewers score applications on a point system based on broad guidelines laid out in the Education Department General Administrative Regulations (EDGAR).

EDGAR recommends evaluating proposals on seven key points: how well they meet the purposes of the program's authorizing law; extent of need for the project; plan of operation; quality of key personnel; budget and cost effectiveness; evaluation plan; and adequacy of resources to carry out the project.

Program officials can use their discretion in assigning points to each of these criteria for a particular competition or can add more criteria, based on the nature of the program.

Point-By-Point

Grantseekers should organize their proposals around the criteria listed in the application package to make it clear to reviewers that they meet requirements, says Paul Thompson, deputy director of the Division of Educational Services in ED's Office of Special Education Programs.

"It would be very helpful if they would write applications point by point," Thompson says. "They would have a better chance" of winning a grant.

Key Questions

When reviewers read applications, they seek answers to a number of questions within each criterion. Key omissions in any area can translate to points taken off when the reviewer scores a proposal.

- Meeting the Purposes of the Authorizing Statute This is the broadest criterion, and reviewers are likely to look at the proposal as a whole, rather than any section of it, to see if the project furthers the purposes of the law on which the grant program is based. Program officers usually don't assign points for this criterion alone, Thompson says, because it probably is addressed in several sections of the proposal. EDGAR, however, recommends giving it a weight of 30 points out of 100.

- Extent of Need for the Project "You can sort out good applications from the bad in this area alone," Thompson says. Grantseekers who are unable to describe the nature of the problem adequately are not likely to be able to solve that problem, he says. EDGAR recommends assigning a maximum of 20 points under this criterion.

Reviewers look not only for identification but also documentation of the needs—number of children served and impact on the children of the loss or absence of the service, for example. Reviewers also will take into account whether the applicant has listed more needs than can be addressed in the proposed time frame and with the proposed resources.

- Plan of Operation Reviewers determine how well a project is designed and considers whether: objectives are consistent with stated needs and activities are consistent with objectives; the project has an effective management plan; the progression of tasks is logical; and the schedule is realistic. EDGAR recommends 15 points.

Program officials also stress that applicants should cite research that supports their approach to the project. And it's helpful to include a diagram with the narrative to give reviewers a strong, graphic presentation of the sequence of activities, Thompson says.

It's also important to go out on a limb a little and be specific in laying out objectives, says Philip Parr, development director for the Pittsburgh school district. For instance, if reducing the dropout rate is an objective, the grantseeker must say how much the rate would drop and when.

"Organizations sometimes don't like to put themselves on the line like that," Parr says. Many will state their objectives only in general terms without a time line. "But this weakens the proposal in the eyes of most funders," he says. "They can tell that this organization isn't ready to bite the bullet."

(more)

Proposal-Writing By the Numbers: ED's Grant Scoring System (Cont.)

- Quality of Key Personnel Reviewers want to know whether job descriptions of the people involved in the project reflect skills needed to make it work and what relevant qualifications proposed staff possess. EDGAR recommends seven points.But it's not enough to submit pages of curriculum vitae, Thompson warns. Reviewers need to see what specific experiences apply to specific project tasks.

"Often, a project rises or falls on the quality of the people in it," he says.

If staff is not already in place, the proposal-writer must describe how positions will be advertised, when hiring will occur and what tasks the staff will perform, Thompson adds. It also is important to note how much time staff will devote to the project and whether training is needed

- Budget and Cost Effectiveness Reviewers determine whether the proposed budget is sufficient to support project activities as well as whether it is padded. Budgets must include a narrative that ties items to specific proposed activities. EDGAR recommends five points.

A common pitfall for applicants is failing to include people familiar with the budget process in writing the proposal. Another weakness is incorporating equipment or travel that isn't justified.

"Lots of projects come in with a list of equipment that makes you wonder if they're operating out of a tent," Thompson says.

- Evaluation Plan Constructing this portion of a proposal can be difficult for many applicants. Reviewers look for appropriateness of the methods to be used, whether the evaluation is likely to be objective, who will perform it, whether the methods will in fact measure how well the project met its objectives and whether the data the plan produces is likely to be reliable. EDGAR recommends five points.

The panel will try to determine whether hard data on a project can be obtained, Thompson says. But the effectiveness of many activities may be tough to measure, he adds.

For example, it may be difficult to know whether it is more ~~appropriate to judge the effectiv~~eness of an in-service training program by the number of teachers trained or by the performance of children at some point after the training is completed.

The lack of data for comparison before a project begins is another problem. Applicants must do their best to have initial data by which change can be measured and also must apply the best methods of ensuring that it is the program — rather than some other factor — that accounts for the change.

Input from people with experience in evaluation is essential in preparing this part of the proposal.

- Adequacy of Resources Reviewers look at proposed facilities and equipment to decide whether they are adequate to carry out the project. EDGAR recommends three points.

In addition to the points it recommends for the seven criteria, EDGAR reserves 15 points so program officials may assign extra weight to different areas.

Exceptions Are The Rule

But even within the recommended point system, program officials have a lot of leeway.

"The EDGAR criteria are more the exception than the rule," Thompson says. "Depending on the nature of the competition, criteria are tailored to fit."

For instance, a research grant program is likely to give added weight to the evaluation plan and less to the plan of operation. In a program that furthers work begun in past years, quality of personnel is a key factor. And a program that supports dissemination of information would emphasize the experience of the grantseeker. "It varies considerably," Thompson says.

And many programs will add criteria to supplement those listed in EDGAR, he adds. For example, program officers might require a description of marketing skills and contact with the public for an information dissemination grant or ask for specialized experience to carry out a research or training project.

Whatever the criteria set for a grant program, successful applicants are the ones who use them to present an effective case, Thompson says. These applicants win because they "write more convincingly — it is not necessarily that their are better," he says.

MAKE PROPOSALS STAND OUT TO BEAT COMPETITION, EXPERT SAYS

Reprinted with permission from *Education Grants Alert*, Capitol Publications Inc., P.O. Box 1453, Alexandria, VA. 22313-2053 (703) 683-4100. [May 28, 1992 issue]

Finding a private-sector funding source is a simple task compared to the grantseeker's real challenge: writing a proposal that stands out from the crowd of other applicants who have located the same hot prospect.

A proposal must strongly demonstrate that its project is the best one to further a foundation's or corporation's interests, says Sandra Adams, chief development officer for the American Nurses Association.

Adams offered grantseekers several tips for developing strong proposals at a meeting of the National Society of Fundraising Executives in Baltimore last month.

Establish A Relationship

The first step is to establish a relationship with the funder. Start by calling the program officer, she advises. In this initial contact, a grantseeker should give a quick plug for the organization, outline its project and ask for advice in pursuing a grant from the funder.

"Your goal is to set up a meeting," Adams says, "but in the real world, you'll probably just end up with an encouragement to send in the proposal."

Even if the listing in a directory of funders says the foundation or corporation prefers initial contact by letter, Adams always calls anyway, especially if dealing with a corporation.

"Corporate giving officers usually double as public relations directors and will return your call," she says. "And you can always pretend that you are too stupid to have read the directory."

No matter what the response, the call is important because it introduces the grantseeker to the funder.

Follow Up In Writing

Once you've prepared the ground, follow up by sending a proposal or initial letter as the funder requests. And make it brief but compelling, Adams says.

"Some foundations will not get past the cover letter if it doesn't get their attention. You need to make it as strong as possible."

Strong initial letters and proposal cover letters include the same elements. They should:

- Be written on the organization's letterhead;
- Address the program officer by name;
- Refer to the phone call;
- Include a hard-hitting statement of need for the project and/or human interest story to represent the problem;
- Put a specific request for funds up front;
- Tell how the organization will fix the problem by meeting specific project goals;
- Explain why the organization is the best one to solve the problem;
- Promise to follow up with a call to discuss any questions the funder may have; and
- Be no longer than two pages.

Don't Forget the Abstract

If the funder's response to the letter is positive, it's time to begin writing the proposal. First, go over application guidelines carefully, Adams advises. If the funder sets a format for proposals, follow it exactly.

(more)

Make Proposals Stand Out to Beat Competition (Cont.)

If there is no specific format required, a one-page proposal summary or abstract on a separate sheet should come first. Include the same information provided in the cover letter. Program staff usually photocopy and distribute the summary pages to board members, who often use them to make the final funding decision.

Never skip the summary page, Adams advises, even if the funder doesn't request it.

"You're killing your proposal if you don't do an abstract," she says. If program staff don't find a summary in a proposal, they may prepare one themselves, leaving the grantseeker with no control over the way the project is presented.

When writing the full proposal, be sure to include the following elements:

- A statement of the organization's mission, track record, goals and objectives, resources and future plans;

- A problem statement and needs assessment that convey a sense of urgency about addressing the issue; discuss how future trends could make the problem worse; lay out what groups the project will help; and note studies and sources for the information provided;

- A project narrative listing measurable project goals with a timeline that lays out specifically what the project will do and when. A graphically presented timeline is helpful, Adams says.

- A statement of staff capability that cites relevant experiences of project personnel. This section should be no more than one or two paragraphs per person; include complete resumes in the appendix;

- A budget summary listing total expenses for each program area, such as travel, equipment, personnel, and a narrative detailing expenditures in each category. Staff often give the budget summary to board members along with the project abstract;

- An evaluation component referring back to program objectives and including a follow-up survey of participants; and

- Plans for continuing the project after the grant expires.

Write Consistently But Convincingly

Writing the proposal well is just as important as organizing it properly, Adams says. She recommends using one person as the final editor so sections farmed out to other staff members have a consistent style and flow smoothly.

Sentences should be brief, written in layman's terms and painstakingly proofread. But don't allow attention to form and style to squeeze the humanity out of the proposal, Adams cautions.

"Remember, this is not the federal government," she says. "This business is people-driven, and you are allowed to be interesting."

Contact: Sandra Adams, American Nurses Association, 1101 14th St. NW, Suite 200, Washington, DC 20005, (202) 55~~4-4444~~.

SAMPLE EVALUATION FORM FOR CURRICULUM DESIGN PHASE

Please answer each questions with a check (for *Yes* or *No*) or an *NA* for Not Applicable or Don't Know.

A. PRE-DELIVERY QUESTIONS

Yes No

___ ___ Are you familiar with the stated goals and objectives of this program?

___ ___ Does the curriculum address the stated goals and objectives?

___ ___ Are the goals, objectives, and strategies outlined in the curriculum?

___ ___ Was the curriculum presented to the Advisory Team/Management in a professional manner?

___ ___ Is the curriculum user-friendly for the instructor?

___ ___ Do you believe the curriculum is manageable and achievable in terms of time allotted?

___ ___ Was it reviewed by all partners before going on-line?

___ ___ Does the curriculum correspond to the culture and philosophy of the company?

___ ___ Could the curriculum design *process* be improved? If *Yes*, how?

____

____

B. POST-DELIVERY QUESTIONS

___ ___ Did the program meet its objectives?

___ ___ Is it possible to determine the impact on the course in the workplace?

___ ___ Did participants show improvement on the job? If *Yes*, in what ways? Please list.

____

____

Adult Education/Workplace Curriculum Continuum

Learner-Driven Programs		<---------------------->	Business-Driven Programs	
Customized for Student Needs		Customized for Both Student and BIG Needs	Customized for BIG Needs	
Life Skills	Literacy/ ABE/GED	Adult Education using workplace materials	Job Specific Skills	Critical Thinking Skills

Job Analysis Matrix

Job:

STEP	KNOWLEDGES	SKILLS	ATTITUDES	FUNDAMENTAL CONCEPTS
1.				
2.				
3.				
4.				

Step refers to the particular part of the job, each actual task.

Knowledges refers to the body of information a person must have in mind to perform a job.

Skills refers to physical actions that a person must do to perform a job.

Attitudes refers to values and beliefs that guide behavior or habits that a person must practice while performing a job.

Fundamental Concepts are the basic skills, the "underpinnings", which serve as the foundation for the actual job tasks.

BEST COPY AVAILABLE

Example of a List of Tasks Required in a Job (page 1 of 3)

IE COMPETENCIES and SKILLS	✓	MGR	DATE	INSTR	DATE	COMMENTS
National Electric Code (NEC)						
Demonstrates correct use of current NEC Handbook						
Locates all applicable codes per job and completes job to code specifications						
Makes consistently accurate NEC calculations:						
Branch Circuits						
Feeders						
Services						
Conductor Ampacities						
Conduit Fill						
Other as specified						
Planning Layouts						
Reads construction drawings, including but not limited to:						
Schematics						
Elevations						
Plot Plans						
Wiring Diagrams						
Layouts						
One-Line Diagrams						
Completing Jobs						
Orders and tracks materials and parts						
Locates and secures necessary resources						
Identifies all safety considerations and takes proper steps to address them						
Sets Scheduling and Timing						
Develops Job Checklist						
Maintains accurate records						
Coordinates work with others: Engineering, management, other trades, production						

5-4 (3 pages)

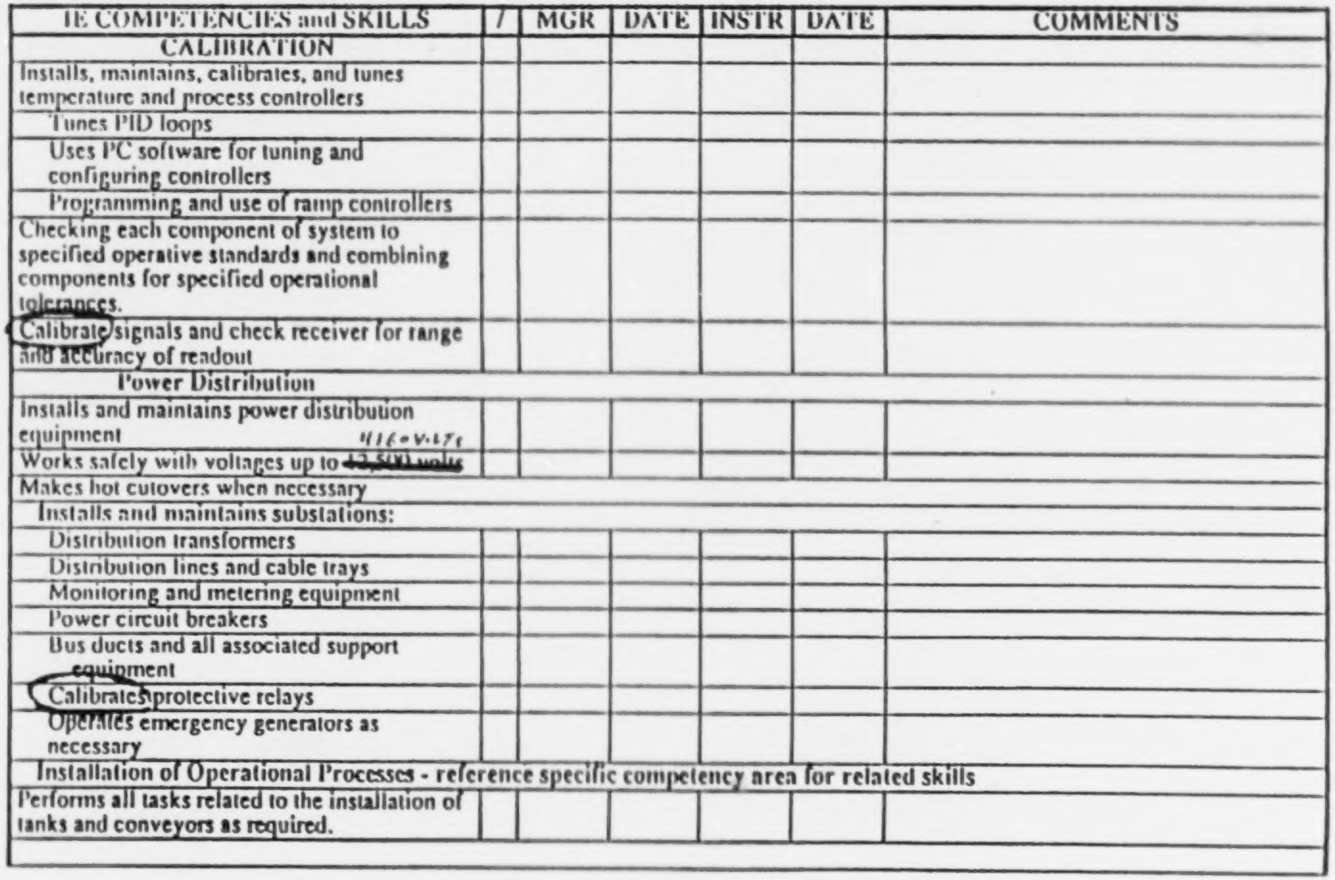
Some workplaces have task listings for the various jobs. These can help you identify the basic skills that are embedded in the job. It gives you a reasonable point of departure for casual observation, investigation, discussion, and follow up.

Example of a List of Tasks Required in a Job (page 2 of 3)

IE COMPETENCIES and SKILLS	/	MGR	DATE	INSTR	DATE	COMMENTS
Makes electrical or mechanical tests as required to isolate the fault						
Initiates requisitions for repair parts and supplies						
Corrects the fault						
Tests repaired unit for proper operation						
⇒ Provides and maintains records / reports as directed						
Process Troubleshooting and Maintenance						
Installs, maintains, and troubleshoots process monitoring readouts and computer I/O hardware (CPI, etc.)						
Can use diagnostic software						
Understands how cold junction compensation is done and how to troubleshoot						
Can aid in diagnosis & repair of networks						
Understands binary, hex, and BCD number systems						
Develops skill and knowledge to troubleshoot a production process and repair the fault. Informs maintenance if other trades are needed.						
⇒ Reads manuals for various equipment and interprets installation, performance, and troubleshooting instructions						
Works with vendors either on site, or over the telephone for clear understanding of equipment, its application, and repair.						
Works from prints to develop overall system operations for diagnostics and repair						
Work with operations personnel to determine symptoms and execute repair of process equipment						
Identifies interactions between mechanical, electrical, and thermal systems to define problem areas for repair.						

Some workplaces have task listings for the various jobs. These can help you identify the basic skills that are embedded in the job. It gives you a reasonable point of departure for casual observation, investigation, discussion, and follow up.

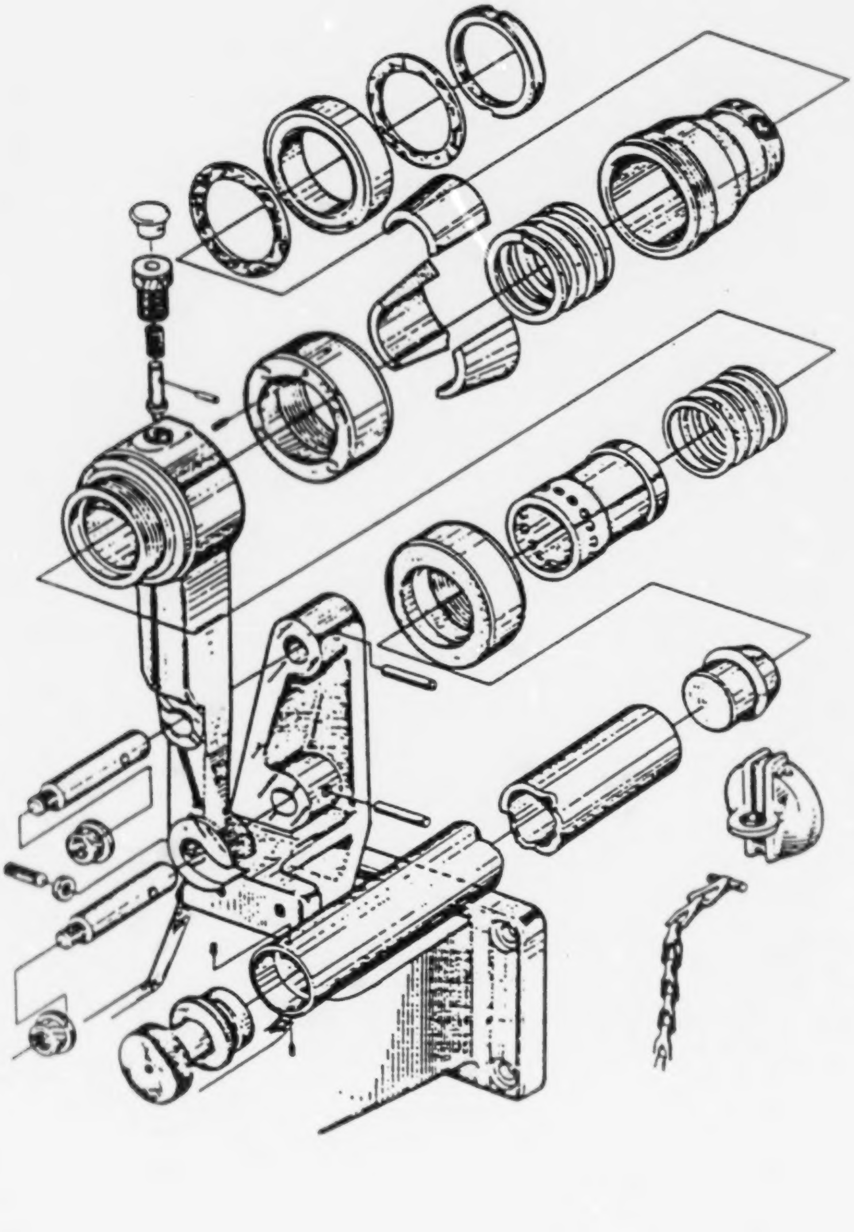
Example of a List of Tasks Required in a Job (page 3 of 3)



IE COMPETENCIES and SKILLS	/	MGR	DATE	INSTR	DATE	COMMENTS
CALIBRATION						
Installs, maintains, calibrates, and tunes temperature and process controllers						
Tunes PID loops						
Uses PC software for tuning and configuring controllers						
Programming and use of ramp controllers						
Checking each component of system to specified operative standards and combining components for specified operational tolerances.						
Calibrate signals and check receiver for range and accuracy of readout						
Power Distribution						
Installs and maintains power distribution equipment						
Works safely with voltages up to ~~12,500 volts~~ 4160 Volts						
Makes hot cutovers when necessary						
Installs and maintains substations:						
Distribution transformers						
Distribution lines and cable trays						
Monitoring and metering equipment						
Power circuit breakers						
Bus ducts and all associated support equipment						
Calibrates protective relays						
Operates emergency generators as necessary						
Installation of Operational Processes - reference specific competency area for related skills						
Performs all tasks related to the installation of tanks and conveyors as required.						

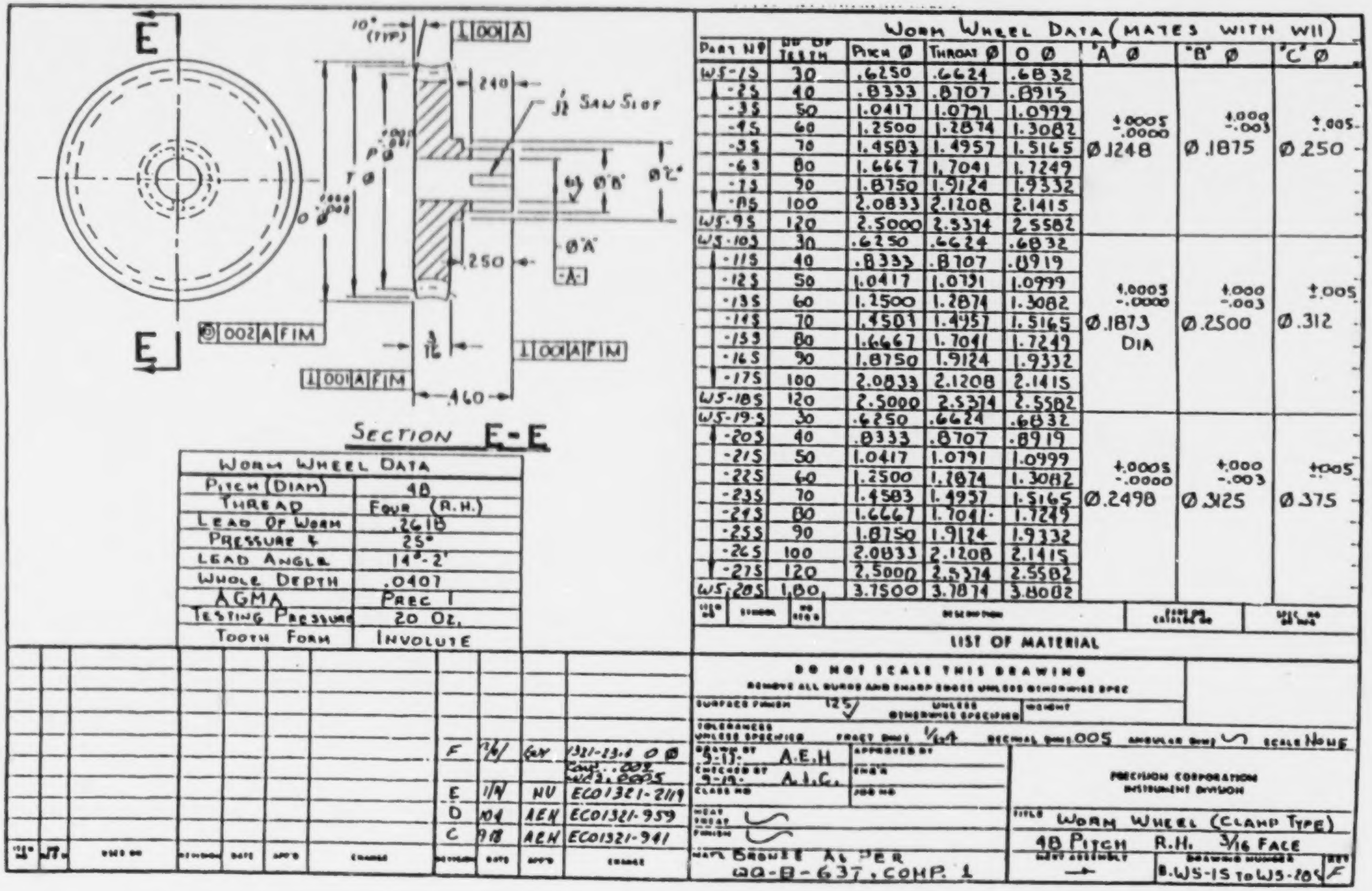
Some workplaces have task listings for the various jobs. These can help you identify the basic skills that are embedded in the job. It gives you a reasonable point of departure for casual observation, investigation, discussion, and follow up.

"Reading" Skills Required in a Workplace: Example #1



An employee in a manufacturing environment might be asked to "read" a diagram such as this.

"Reading" Skills Required in a Workplace: Example #2



WORM WHEEL DATA	
PITCH (DIAM)	48
THREAD	FOUR (R.H.)
LEAD OF WORM	.2618
PRESSURE ∠	25°
LEAD ANGLE	14°-2'
WHOLE DEPTH	.0407
AGMA	PREC 1
TESTING PRESSURE	20 OZ.
TOOTH FORM	INVOLUTE

WORM WHEEL DATA (MATES WITH W11)

PART NO	NO OF TEETH	PITCH Ø	THROAT Ø	O Ø	'A' Ø	'B' Ø	'C' Ø
WS-1S	30	.6250	.6624	.6832	+.0005 -.0000 Ø.1248	+.000 -.003 Ø .1875	±.005 Ø .250
-2S	40	.8333	.8707	.8915			
-3S	50	1.0417	1.0791	1.0999			
-4S	60	1.2500	1.2874	1.3082			
-5S	70	1.4583	1.4957	1.5165			
-6S	80	1.6667	1.7041	1.7249			
-7S	90	1.8750	1.9124	1.9332			
-8S	100	2.0833	2.1208	2.1415			
WS-9S	120	2.5000	2.5374	2.5582			
WS-10S	30	.6250	.6624	.6832	+.0005 -.0000 Ø.1873 DIA	+.000 -.003 Ø.2500	±.005 Ø .312
-11S	40	.8333	.8707	.8919			
-12S	50	1.0417	1.0791	1.0999			
-13S	60	1.2500	1.2874	1.3082			
-14S	70	1.4583	1.4957	1.5165			
-15S	80	1.6667	1.7041	1.7249			
-16S	90	1.8750	1.9124	1.9332			
-17S	100	2.0833	2.1208	2.1415			
WS-18S	120	2.5000	2.5374	2.5582			
WS-19S	30	.6250	.6624	.6832	+.0005 -.0000 Ø.2498	+.000 -.003 Ø .3125	±.005 Ø .375
-20S	40	.8333	.8707	.8919			
-21S	50	1.0417	1.0791	1.0999			
-22S	60	1.2500	1.2874	1.3082			
-23S	70	1.4583	1.4957	1.5165			
-24S	80	1.6667	1.7041	1.7249			
-25S	90	1.8750	1.9124	1.9332			
-26S	100	2.0833	2.1208	2.1415			
-27S	120	2.5000	2.5374	2.5582			
WS-28S	180	3.7500	3.7874	3.8082			

LIST OF MATERIAL

REV	DATE	APPD	CHANGE
F	7/6/	GW	1321-23.1 O Ø CHG. .002 WAS .0005
E	1/14	NU	ECO1321-2119
D	10/4	AEH	ECO1321-959
C	9/18	AEH	ECO1321-941

DO NOT SCALE THIS DRAWING

REMOVE ALL BURRS AND SHARP EDGES UNLESS OTHERWISE SPEC

SURFACE FINISH 125✓ UNLESS OTHERWISE SPECIFIED

TOLERANCES UNLESS SPECIFIED FRACT DIM ±1/64 DECIMAL DIM ±.005 ANGULAR DIM ± ∽ SCALE NONE

DRAWN BY 9-13- A.E.H

CHECKED BY 9-19- A.I.C.

HEAT TREAT ∽

FINISH ∽

MATL BRONZE AL PER QQ-B-637, COMP. 1

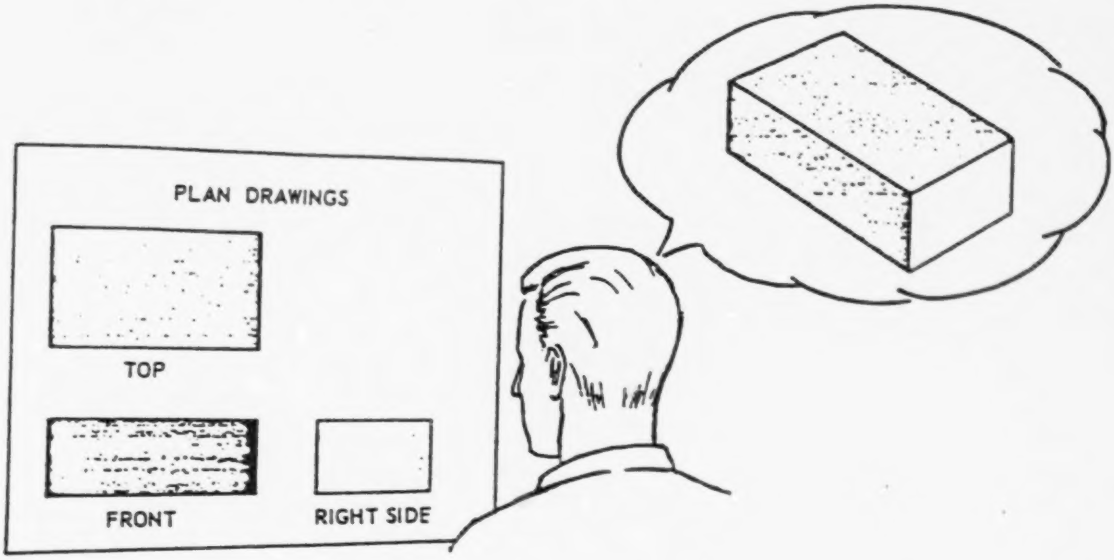
PRECISION CORPORATION
INSTRUMENT DIVISION

TITLE WORM WHEEL (CLAMP TYPE)
48 PITCH R.H. 3/16 FACE

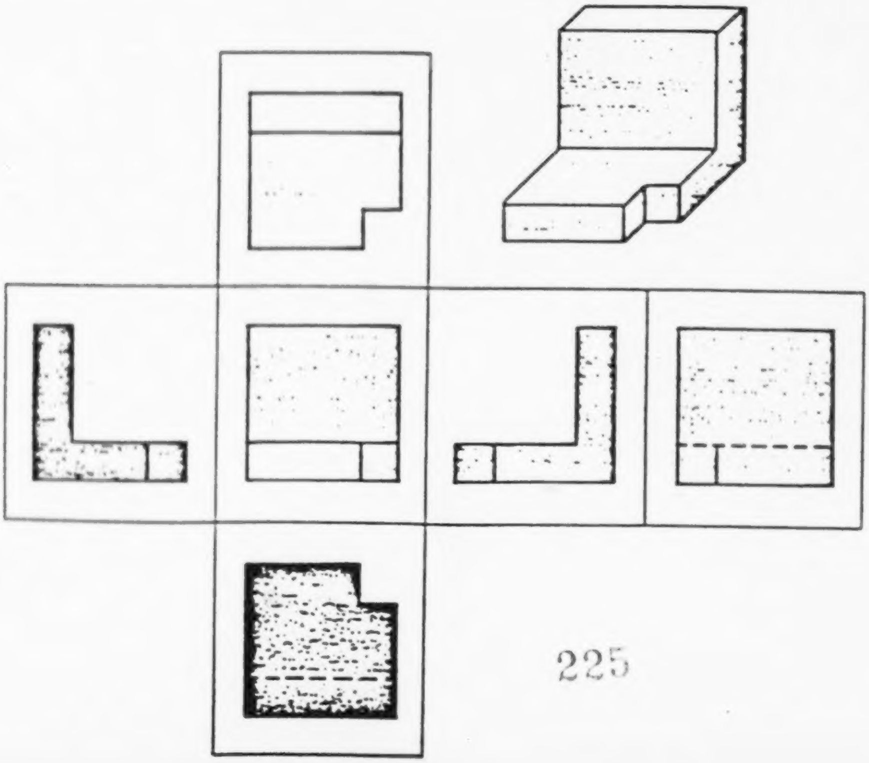
DRAWING NUMBER B.WS-1S TO WS-28S REV F

Employees in a manufacturing environment are often asked to take a graph, a table, or a chart and extract specific pieces of information from it. What type of "reading" skills are required in these cases?

Identifying *Knowledges* and *Skills* Required in a Job



What sort of *knowledge* enables a person to see a one-dimensional object with his/her eye and then translate that to a multi-dimensional object in the mind's eye? What sort of *skill* must a person have to take a blueprint and a mental picture and build an object with their hands or using tools? What *fundamental concepts* are embedded in such *knowledge* and *skill?* Do adult educators have curricula in place to teach this?



Where To Get Additional Information:
Names and Addresses of National Professional Organizations

American Society for Training and Development (ASTD)

Source for technical assistance, resource materials on literacy training, and "how to" manuals regarding instruction of working adults.

(703) 683-8100

Business Council on Effective Literacy (BCEL)

Source of information and analysis on general and workforce literacy. Publishes a quarterly newsletter and has issued valuable "how to" handbooks and guides.

(1221 Avenue of the Americas, 35th Floor, New York, NY, 10020)

Clearinghouse on Adult Career & Vocational Education

Clearinghouse for workforce literacy information, offering free computer bibliographic searches, mini-bibliographies, and fact sheets.

1-800-848-4815

Human Resource Development Institute (AFL-CIO)

Source of organized labor's information on union-involved workplace literacv and training programs.

(202) 637-5144

National Alliance of Business (NAB)

Source of information and referral services to businesses interested in developing workplace literacy programs. Will also contract with businesses to assist them in developing programs for their employees.

(202) 289-2910

National Clearinghouse on Literacy Education

Operated by the Center for Applied Linguistics, a source for literacy teaching materials, workshops, instructional materials, etc.

(202) 429-9292

Project Literacy, US (PLUS)

PLUS is a continuation of the joint public service campaign of Capital Cities/ABC and the Public Broadcasting Service. Outreach efforts of PLUS in enhancing America's workforce skills are funded by Nabisco Brands, Inc.

(412) 622-1491

WORKPLACE BASIC SKILLS INSTRUCTOR QUESTIONNAIRE

Last Name	First Name	Nick Name
Address	Town/Zip	County
Home Phone	Social Security #	

1. I am currently licensed to teach by the State of Virginia. ___ Yes ___ No

2. My teacher's license number is ______________________

3. Other states in which I am licensed to teach are ______________________

4. The subject areas in which I am licensed to teach are: ______________________

____

5. Locations where I can teach are: ______________________

6. The months of the year I am available to teach are:

___ January ___ February ___ March ___ April ___ May ___ June
___ July, ___ August ___ September ___ October ___ November ___ December

7. The days of the week I can teach are: ___ M ___ T ___ W ___ Th ___ F

8. The hours of the day I can teach are:
___ 8:00 AM - 12:00 PM
___ 12:30 PM - 2:30 PM
___ 3:30 PM - 6:00 PM
___ 6:00 PM - 9:00 PM

9. While my certification may be in other areas, I feel comfortable teaching the following subject groupings:

___	Level I/ Literacy	(0 - 4 grade reading level)
___	Level II/ABE	(4 - 8 grade reading level)
___	Level III/GED	(9 - 12 grade reading and math levels)

Please return to: Program Administrator, Address, City, State, Zip

SAMPLE INTRODUCTORY COMMENTS TO WORKPLACE STUDENTS

I. INTRODUCTION AND WELCOME BY MANAGEMENT.

[Suggestion: "We are really pleased to be starting this program. We see it as an opportunity for everyone to benefit: the company and individual employees. We hope it will begin to prepare you for the changes which are coming to the workplace as we get more complex, introduce computers and ...... We recognize that the workplace is changing and we want to be sure that each employee has the skills needed to change with in. In addition, we hope that what you learn in class will have positive effects on your life outside of work.

Please understand that there are no negative ulterior motives. No jobs are in jeopardy. All work will be kept confidential. We hope you will take advantage of the opportunity to brush up on your skills. We will be proud of anyone who participates and does their best."]

II. WELCOME INTRODUCTION OF TEACHER AND AIDE OR ADMINISTRATOR, OR WHOEVER IS PRESENT.

III. COMMENTS BY TEACHER OR ADMINISTRATOR:

Thanks to company for providing this opportunity. I look forward to working together with participants and having a great time while learning.

"Today I want to talk to you about three things:

A. PROMISES

1. I **promise** that this class will be different from any other you have ever been in. Participants can chew gum, drink coffee, talk and, most of all, have a good time. In addition to items set up in the program design, the class will set the ground rules for the class.
2. I **promise** that everything that happens in this class will be confidential and will be kept between you and _______ (teachers names). The company is sponsoring this class to help you develop your skills - they are not interested in anyone's test scores or individual work, only that everyone does the best he or she can.
3. I **promise** that you will not be competing with anyone. The progress you make will be compared to where you are today; not where everyone else ends up tomorrow. Much of what we do in class will be in teams so that you can learn from each other and teach each other and learn to depend on each other just as you do on the job.

B. CHALLENGES

1. **I challenge** you to take an active part in your education - to become a "lifelong learner" who recognizes that your education never ends but should continue each day of your life. The workplace is getting more complex and each of us has a responsibility to keep on learning so that we can be the best employee possible.
2. **I challenge** you to help your teacher understand your work and your life so that this class will be relevant to both. Take the teacher on a plant tour; tell him/her what your job is and what you feel you need to know to do it better.
3. **I challenge** you to help others be as brave as you are by inviting them to join us here.
4. **I challenge** you to take advantage of this wonderful opportunity and to try your hardest and do your best. The company is investing in your future - so should you.

C. RESPONSIBILITIES

1. This company is investing a great deal of time and money in providing classes for its employees. It is the responsibility of **each of us** not to let them down. **We are responsible** for providing the best classes we can; **you are responsible** for taking advantage of them. They are footing the bill - let's do them proud.
2. You are responsible for giving this your best shot.
   a. The GED test is hard (if that's the goal of the class). [For GED classes: In fact, it's estimated that 30% of last year's high school graduates couldn't pass it. Many of you may not be ready to take the GED after this class; but take the responsibility for progressing as far as you can while the classes are going. OR
   b. Going back to school is hard - for a lot of people, it's been years since they were in a classroom. But in all the workplace classes companies in the area have sponsored (this will be the ____), not one employee has ever told us that s/he didn't learn, didn't have things come back faster than they thought they would, or didn't improve their self-confidence by being involved.
3. **You are responsible** for helping the company to see how much you appreciate their investment in you so that other employees at other companies will have similar opportunities.

IV. THANKS AND ENJOY THE CLASS!

Learning Style Characteristics

The Visual Learner:

- Thinks in pictures, visualizes details.
- Is distracted by clutter or movement.
- Can plan in advance; writes thoughts down.
- Stares or doodles or finds something to look at when inactive.
- Is often unaware of sounds.
- Remembers by writing things down.
- Likes order in appearance, notebook, locker, desk.
- May repress emotion, cry easily, or show emotion through facial expression
- Tends to be a good speller.
- Learns by reading or watching demonstrations.
- In group situations, tends to be quiet and watch others.
- Likes to be encouraged by a smile or expression that praises.
- Hobbies include reading, watching TV and movies.
- Likes to read silently.
- When angry, may get teary-eyed, not look at others.
- When working math problems, likes to add figures on paper.
- Emotions can be interpreted by facial expressions.
- When explaining something, describes in detail.
- When examining something new, moves closer to it, looks at it from as many angles as possible.
- When studying, prefers to work alone, make notes, underline.

The Auditory Learner:

- Enjoys listening, but cannot wait to talk.
- Is easily distracted by sounds.
- Reads aloud or sub-vocalizes.
- Talks problems out.
- Remembers stories and directions after hearing them.
- Hums, talks to self or others.
- Enjoys music more than visual arts.
- Expresses displeasure by "blowing off steam" but calms down quickly.
- Remembers by auditory repetition and say it.
- May perform rote memory task well if "sung" to a tune.
- In group situations, talks a lot, raises voice or talks at the same time others do.
- Likes to be encouraged by a friendly word or verbal praise.
- When working math problems, likes to count aloud.
- Emotions can be interpreted by voice tone.
- When explaining something, talks fast or repeats a lot.
- When examining something new, asks questions about it.
- When studying, prefers to work with someone else, asking each other questions.

The Tactile/Kinesthetic Lear

- Drums fingers, taps toes, or asks t room frequently.
- Gestures when speaking.
- Is not attentive to visual or auditory presentations.
- Tends to be impulsive.
- Selects options with the greatest pl activity.
- Reflects emotion through body; sta pounds, jumps, hits, hugs, clenche
- Pushes hard on pencil, breaks point easil
- Learns by trying things out: touches and manipulates.
- Tends to have disheveled appearance because of activity.
- Likes sports and games with movement.
- In group situations, likes to be first or last line, can't wait to get moving.
- Likes to be encouraged by a hug or pat o the back or arm.
- When reading, can't sit still for long.
- When working math problems, counts on fingers or uses objects to count with.
- When explaining something, doesn't give much information; someone has to pry it out.
- When studying, prefers to work alone for short periods interspersed with beaks an like to re-write notes.
- When examining something new, handle wants to feel texture and weight.

Learning Style Tips

As learning becomes more important in our jobs so does understanding our own learning preferences and recognizing learning preferences of others with whom we work. At most, auditory learners make up about 30 percent of the population. But most learning environments, including training in the workplace, is geared to the auditory learner (the "I'll talk and you listen" style of training.)

Experts advise varying styles and mixing up activities during presentations. Try to reinforce major points in different ways to reinforce different styles of learning. Encourage people with whom you work to discover their own learning style and pay attention to ways in which they learn most effectively.

The Visual Learner:	The Auditory Learner	The Tactile/Kinesthetic Le
▪ Use written directions. ▪ Model the skills to be taught. ▪ Show movies, slides, filmstrips, or use pictures for conceptual development. ▪ Also use visual approaches to reading (i.e. whole word, configurations, etc.), because the visual learner may have problems using a phonetic approach. Other intensive methods will have to be used to use sound/symbol association. ▪ Use "families of words" to help in discrimination of short and/or long vowel sounds. ▪ Try allowing time for the person to read more silently than orally. ▪ Use charts, maps, and visual aids to help with encoding.	▪ Give ample time for written tasks. ▪ Give auditory clues along with visual presentations. ▪ Reinforce a phonetic approach to reading. ▪ Encourage discussion and small group work. ▪ Use blocking and cuing to aid in visual discrimination. ▪ Use a tape recorder. ▪ Encourage the person to tell stories or speak aloud while you write down what is said.	▪ Use manipulative materials (r that can be touched or moved). ▪ Encourage the person to draw what said/learned. ▪ Record in writing what is being said/ ▪ Role play. ▪ Allow the person to move around th as part of the activity. ▪ Cooperative learning or group activi helpful. ▪ Present concrete, real-life experien rather than abstractions when givin directions or teaching a new skills

Learning Style Preference

Read each sentence carefully and think if it applies to you.
On the line write: 3 - often, 2 - sometimes applies, or 1 - never applies

VISUAL

____ 1. I enjoy doodling and even my notes have lots of pictures, arrows, etc. in them.
____ 2. I remember something better if I write it down.
____ 3. I get lost or am late if someone TELLS me how to get to a new place and I didn't write down the directions.
____ 4. When trying to remember someone's telephone number, or something new like that, it helps me to get a picture of it in my head.
____ 5. If I am taking a test, I can "see" the textbook page and where the answer is.
____ 6. It helps me to LOOK at the person when listening. It keeps me focused.
____ 7. I had speech therapy.
____ 8. It's hard for me to understand what a person is saying when there are people talking or music is playing.
____ 9. It's hard for me to understand a joke when someone tells one.
____ 10. It is better for me to get work done in a quiet place.

Visual Total ____________

AUDITORY

____ 1. My written work doesn't look neat to me. My papers have crossed-out words and erasures.
____ 2. It helps to use my finger as a pointer when reading to keep my place.
____ 3. Papers with very small print or blotchy dittos or poor copies are tough on me.
____ 4. I understand how to do something if someone tells me rather than having to read the same thing to myself.
____ 5. I remember things that I HEAR, rather than things that I see or read.
____ 6. Writing is tiring. I press down too hard with my pen or pencil.
____ 7. My eyes get tired fast, even though the eye doctor says my eyes are OK.
____ 8. When I read, I mix up words that look alike, such as "them" and "then," and "bad" and "dad."
____ 9. It's hard for me to read other people's handwriting.
____ 10. If I had the choice to learn new information via a lecture or a textbook, I would choose to hear it rather than read it.

Auditory Total ____________

TACTILE/KINESTHETIC

____ 1. I don't like to read directions. I'd rather just start doing.
____ 2. I learn best when I am shown how to do something and I have the opportunity to do it.
____ 3. Studying at a desk is not for me.
____ 4. I tend to solve problems through a more trial-and-error approach, rather than from a step-by-step method.
____ 5. Before I follow directions, it helps me to see someone else do it first.
____ 6. I find myself needing frequent breaks while studying.
____ 7. I am not skilled in giving verbal explanations or directions.
____ 8. I do not become easily lost, even in strange surroundings.
____ 9. I think better when I have the freedom to move around.
____ 10. When I can't think of a specific word, I'll use my hands a lot and call something a "what-cha-ma-call-it" or a "thing-a-ma-jig."

Tactile/Kinesthetic Total ____________

WORKPLACE TEACHING TIPS

1. Create geography lessons using exports and customers. Map product from raw materials to finished product.

2. Know who customers are for each company.

3. Teach to teams so employees solve problems in teams.

4. Allow employees to set up class guidelines (when to take breaks, how long, eating, smoking).

5. Consider use of "exit slips" each day as a writing exercise.
   What did you like today?
   What didn't you like today?
   What do you want to do more of in future classes?

6. Use actual forms to teach.
   Talk about why information on the forms is needed?
   Where does the form go when it has been filled out?
   What are the consequences of filling out the form incorrectly? or *Why is it important to be accurate each time?*
   Work through the consequences of mistakes.
   Recall cost exercises.
   Brainstorm improvements in the form and make suggestions for change to management.

7. Use work-related materials.

8. Improve communication skills. Demonstrate them yourself.

9. Use professional and "adult looking" materials. (Resist the temptation to use 17th generation copies or elementary level materials.)

10. Teach to "gray areas." Know and reinforce that in most instances there is more than one right answer. Encourage students to document their answers. How they thought through their answers is often more important to the teaching and learning process than the accuracy of the answer.

11. If the class is GED-oriented, use workplace materials as much as possible.

12. Use and have available many types and kinds of supplemental materials.

13. Don't be tied to the TABE and/or other formal assessment tests.

WORKPLACE MATH PROBLEMS

The following problems were developed as part of a math refresher class at a lime mine. Problems were solved in teams.

Problem #1: A truck weighs in at 29,000 pounds empty with an order to deliver 27 tons of lime to Southern States. The maximum allowable weight of a truck is 80,000 lbs. How can the driver fill this order?

Discussion: math skills, weights and measures. Note: a driver can't legally fill the order by making only one trip. S/he could, however, make two trips or call for another truck. What are other options for filling the order? How many different answers can the teams come up with? Are students comfortable with the idea that more than one answer is correct? You might also discuss why 80,000 pounds is the legal maximum. [To protect the roads.]

Problem #2: C & T Carrier has a contract to move 18 pallets of hydrate by truck. They send a truck weighing 30,000 lbs empty. Hydrate comes in 50 pound bags. Each pallet holds 45 bags. How much will the truck weigh when it is fully loaded, including the weight of the truck?

Discussion: math skills. What process did the team take to arrive at their conclusion. Did they add first then multiply? Did they discuss how to work the problem before diving in on the math? *Process* is the key. Again, there is more than one way to arrive at the answer. Help learners feel comfortable with that.

Problem #3: Lime has run out of pallets and an emergency order must be filled. Three pallets have to be built this afternoon so the order can be filled and shipped on time. Braces for pallets are left over from old damaged ones but they need new slats. Each pallet has 5 slats. It takes 4 ½ feet of lumber of make one slat. We only have 1" x 4" x 12s on hand. How man 12' boards will be needed to build three pallets?

Discussion: Estimating numbers. If teams multiply 4.5' x 5 slats x 3 pallets and then divides that number of fee by 12, they will get an incorrect answer because you can only get two slats out of each 12' piece of lumber. Again, thinking through the process is the key.

Problem #4: The majority of lime shipped from this company goes to a trans-loading facility in St. Matthews, South Carolina. Locate St. Matthews on a map. What is the direction, as the crow flies, from the plant to St. Matthews? Estimate the mileage "as the crow flies." Estimate the mileage by road. What is the difference between the two?

Discussion: Map skills and directions. What does "as the crow flies" mean? [The shortest, straightest line between two points, disregarding geography.] Discuss how to estimate and when it's appropriate to estimate and when it is not.

LIFELONG LEARNING EVALUATION SURVEY #1
XXXX INDUSTRIES, INC.

NOTE: All information in this survey will be confidential. A summary of all answers will be made to XXXX Industries but individual names will not be attached to comments unless the employee wishes us to do so. Please answer all questions.

1. Why did you choose to enroll in XXXX Industries' **LIFELONG LEARNING** program?

2. What are the benefits of being part of this program?

3. What are the drawbacks of being part of this program?

4. What things do you like about the program?

5. What things would you like to change?

6. Has your view of education changed since you started this program?
_ YES _ NO If "yes," how have your ideas changed?

7. Would you like to see LIFELONG LEARNING classes at XXX Industries continued?
_ YES _ NO Why?

8. Are you using information you have learned in this class at work?

_ YES _ NO If so, in what ways?

9. Are you using information you have learned in this program at home?

_ YES _ NO If so, in what ways?

10. Does your family support you taking the **LIFELONG LEARNING** class?

_ YES _ NO

11. Have you taken the GED? ____ YES ____ NO DATE OF TEST: __________

12. What would you like XXX Industries to know about the **LIFELONG LEARNING** program?

NAME (Optional) ____________________ DATE: ______________

DATE YOU STARTED ______________ SHIFT: ______________

BEST COPY AVAILABLE

WORKPLACE CLASS EVALUATION SURVEY #2

Your age ____ Sex ____

Please put the number in the space to the left of the question that best answers the following: (Some questions will not apply to your class. Please use #5 for those questions.)

1 = Always 2 = Usually 3 = Sometimes 4 = Never
5 = No Answer

___ 1. Are classes helpful to you?

___ 2. Is time in class used wisely?

___ 3. Does your teacher know what s/he is trying to teach you?

___ 4. Can your teacher teach so you can understand?

___ 5. Is your teacher enthusiastic in class?

___ 6. Does your teacher challenge you to think?

___ 7. Does your teacher give you special attention when you need it?

___ 8. Is your teacher prepared for class?

___ 9. Does your teacher encourage you to state your opinion?

___10. Does your teacher answer your questions?

___11. Does your teacher help you find answers for yourself?

___12. Does your teacher listen to you?

___13. Is your class comfortable to be in?

___14. Were you challenged by this class?

___15. Were class discussions useful?

___16. What did you like best about the class?

___17. What would make class better?

___18. Can you give your best effort in class? Why or why not?

___19. Why did you take this class?

___20. Was your attendance good?

Thanks for taking the time to fill out this evaluation form!

Sample Evaluation Results
Basic Math Skills Class

I am very pleased how this first class went and am looking forward to future classes. The aide and I agree the employees here were the most motivated and interested of all the adults we have ever worked with. I think a lot of this can be attributed to the support the company gave to the class and the structure and format of the class itself, primarily team problem-solving.

It took them a couple of weeks to really begin functioning as teams, but once they did I was amazed at how well they worked together in small groups of five and as a class as a whole. As soon as a problem was raised, no encouragement to get started was needed, students dove right into it. You could watch them leaning in towards each other to discuss what the task was and the various ways they might go about solving it. Then helping each other when one would get struck or didn't understand something.

Students also contributed to the lass by bringing in components that we had talked about as well as material they had questions about. Some even provided and generated their own material in addition to adding to the tasks, aspects that I hadn't considered.

It was exciting to see them gain confidence in their abilities, especially those who at the beginning spoke of being failures at math and even better to watch them enjoying it. Many students even took books home to work more in areas they were interested in or felt a need. There was a definite enthusiasm about learning that was contagious.

It was startling how fast we came together as a unit and sad to see the class come to an end so quickly. We could easily have spent another month covering the material we did in greater depth in addition to including more tasks from a variety of departments. I recommend for this reason that the next class be lengthened from 7 weeks to 12 weeks with one week for testing. More time to spend on task analysis, actually observing the employees doing their jobs as well as collecting material would also be helpful. That way employees can get a broader understanding and feel for what is going on in other parts of the corporation and their relation to these departments as well as further improving their math competency.

I have thoroughly enjoyed working for this company. I hope we can continue this relationship into the future with not only another Basic Math Class, but also a GED class. The Test of Adult Basic Education (TABE) was administered at the beginning and end of the Basic Math Class. Students were give Test 3: Mathematics Computation and Test 4: Mathematics Concepts and Applications from the complete battery. Below are pre- and post- scores listed by grade level as well as total average scores. Also noted are the differences between pre-and post-test scores.

#	Pre-test (10/06)			Post-test (11/17)			Diff
	Test #3	Test #4	Total	Test #3	Test #4	Total	
1	8.5	10.2	9.5	8.7	8.2	8.5	-1.0
2	9.3	12.1	10.0	12.9	12.1	12.9	+2.0
3	7.1	6.9	7.1	10.9	7.9	8.7	+1.6
4	7.3	4.7	5.4	7.8	7.2	7.5	+2.1
5	6.4	8.6	7.4	8.6	8.9	8.9	+1.5
6	6.4	4.6	5.2	6.4	6.4	6.5	+1.3
7	6.0	4.7	5.4	6.0	7.9	6.9	+1.5
8	5.8	3.9	5.0	6.1	4.2	5.3	+0.3
9	7.0	4.5	5.8	10.9	9.0	10.1	+4.3
10	7.8	6.9	7.4	8.1	9.5	8.8	+1.4
11	8.7	8.5	8.6	12.9	9.6	10.9	+2.3
12	7.0	7.2	7.5	8.1	8.6	8.3	+0.0
13	8.5	5.7	7.2	8.3	6.9	7.7	+0.5
14	7.1	8.6	7.9	9.3	9.3	9.3	+1.4
15	6.8	6.1	6.6	6.5	8.6	7.4	+0.8

Average increase in grade level in six weeks: 1.4 grades

Tips For Effective (Lively and Exciting) Training

Training "Do's"

- Give clear introduction of who you are and what you'll be covering.
- Speak slowly and clearly.
- Have name tags and name tent cards.
- Call people by name during the workshop.
- Get people as involved as possible. Use small groups to discuss the issue.
- During instructions for a group exercise, announce that you will need a recorder and a reporter. Perhaps suggest ways to select them. (Helps people not panic.)
- Tell participants how much time is left during an exercise. ("You're half way through and have 5 minutes to go.")
- Choose group leaders in interesting ways (i.e., the person with the longest hair; the one who has been in their job the shortest amount of time).
- Give "prizes" for responses, volunteers, best response (candy, note pads)
- Don't single people out when making a point. Be generic. (Pointing to someone during a discussion of lousy workers, for example, implies *that* person IS one.)
- Have a timer to keep you on task (either a person or a portable battery-operated clock)
- Take breaks.
- Ask someone to be in charge of getting people back from breaks.
- Pre-print flip charts when possible.
- Use "graph paper" newsprint to help you write straight and organize tables/charts.
- Dress up your flip charts by drawing a logo or picture on it.(Use an overhead projected onto the flip chart to trace the image.)
- Use 2 or 3 colors per flip chart page.
- Write in bold colors (blue, green, black, red, purple)
- Use lighter colors for bullets (orange) or accent.
- When making lists, alternate colors for each line.
- Post flip chart pages on the walls.

WORKPLACE EDUCATION VERSUS ADULT BASIC EDUCATION

	Workplace Education	**Adult Basic Education**
Instructor's Roles	• to become familiar with the company culture and products • to upgrade skills of the employees in response to employees' and employers' needs	• to become familiar with the characteristics of adult learners • to upgrade skills of the students in response to their needs and the communities' needs
Course Goals	• students and instructors customize goals to meet company and student education needs • course goals are based on functions to be performed in the workplace	• students select course and are placed by an entry level assessment • course goals focus on life skills and are often predetermined by educational level of student
uctional Methods and Strategies	• are chosen based on the workplace environment, learner needs, and the curriculum	• are chosen based on the choices of students, instructors, and adult education departments
Assessment	• instructor creates assessments based on specific objectives through a variety of methods	• instructor usually employs standardized tests in combination with more subjective measures
Transfer of Learning	• emphasis is on transferring new skills to students' jobs, their personal lives, and their communities	• emphasis is on transferring new skills to students' personal lives and their communities
Texts and Resources	• primary texts and resources used are authentic to the workplace • employees' jobs determine the materials used in classroom instruction	• primary texts and resources focus on life skills for the adult student • students' needs determine the materials used in classroom instruction

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